

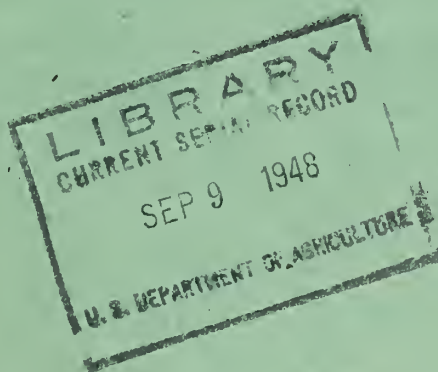
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FARM PRODUCTION

GOALS

HANDBOOK
for
1946



FOR ADMINISTRATIVE USE ONLY
U.S. DEPARTMENT OF AGRICULTURE

1946 PRODUCTION GOALS HANDBOOK

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FOREWORD

The year 1946 marks the fifth in which production goals have been set for all major crops and livestock and livestock products.

Suggested national goals call for a total acreage of over 356 million acres in 1946, not as great as 1945 goals but approximately $5\frac{1}{2}$ million acres more than indicated acreage planted and crops grown during 1945.

The end of the war has not brought an end to the almost unlimited need for American food. We still have our own people to feed, including the military forces. For all major commodities the recommended goal would provide a civilian per capita consumption higher than during war years. At the same time, we are not forgetting our allies who now face hunger because war destroyed or damaged their normal food production.

In suggesting continued high production during this first post-war year, I cannot fail to pay tribute to the marvelous production efforts of farmers during the war. Too often the blessing of good food is a fact many of us take for granted, forgetting that hard toil and, many times, heartache went into its making. Production of a third more food than in the average prewar year played a big part in winning the war.

Throughout war years, production goals proved invaluable in helping farmers balance national requirements with the production capacity of their farms. The 1946 goals indicate a pattern of production which provides high output of commodities for which wartime demand is continuing, and shifts toward peacetime levels for others. Recognition is given to the need for increased conservation of our soil resources.

I want to emphasize that goals for 1946 represent the actual desired production. Producing "too much" during the war was next to impossible. Producing during peacetime calls for more careful planning, so that we may have the right things in the right amounts. It will be more important than ever that farmers understand the "why" of the goals.

CLINTON P. ANDERSON
Secretary

CROP GOALS: 1946 Acreage with Comparisons

	Planted Acreage (thousands)			Percent 1946 Goal is of	
	1946	1945	1937-41	1945	1937-41
	Suggested Goal	Indicated	Average	Indicated	Average
<u>Food and Fiber Crops:</u>					
Wheat	68,875 2/	68,808	69,311	100	99
Rye 1/	2,572 2/	2,096	3,700	123	70
Rice	1,405	1,511	1,118	93	126
Dry Beans	2,000	1,976	1,977	101	101
Dry Peas	488 2/	544	280	90	174
Soybeans for Beans 1/	9,500	10,596	4,121	90	231
Flaxseed	4,200	4,149	2,307	101	182
Peanuts, Grown Alone	3,250	3,953	2,361	82	138
Peanuts, Picked and Threshed 1/	(2,500)	(3,238)	(1,818)	77	138
Cotton	20,000	18,355	26,357	109	76
Broomcorn	328	271	327	121	100
Sugar Beets	1,025	780	914	131	112
Sugarcane, except Sirup 1/	327	303	291	108	112
Potatoes, All	2,780	2,916	2,913	95	95
Commercial Early	(308.3)	(358.9)	(331.1)	86	93
Sweetpotatoes	750	719	741	104	101
Truck Crops: Fresh 1/	1,827	1,849	1,731	99	106
Processing	2,004	2,093	1,486	96	134
<u>Tobacco: 1/</u>					
Flue-cured	1,162.0	1,056.3	925.4	110	126
Fire-cured	75.2	30.2	112.7	125	67
Burley	476.6	529.6	395.3	90	121
Dark air-cured	43.8	43.8	44.4	100	99
Other (including La. and Md.)	148.7	131.9	136.3	113	109
<u>Feed Crops:</u>					
Corn	97,000	94,154	91,975	103	105
Oats	46,000	45,911	39,646	100	116
Barley	13,000	11,922	14,290	109	91
All sorghums, except Sirup	16,600	16,048	17,070	103	97
Total Cultivated Crops	295,838	290,776	284,529	102	104
<u>Hay and Hay Seeds: 1/</u>					
All Tame Hay	60,000	59,459	57,197	101	105
Hay Seeds 3/	(5,630)	(4,840)	(3,450.5)	116	163
Cover Crop Seeds 4/	406 2/	353	182	115	223
Grand Total	356,244	350,588	341,908	102	104

1/ Harvested.

2/ Sum of State goals.

3/ Includes alfalfa; red, alsike, sweet, and ladino clover; lespedeza.

4/ Includes hairy vetch, common and Willamette vetch, Austrian winter peas, and crimson clover.

CROP GOALS: 1946 Production with Comparisons

Commodity	1946 Goal	: 1945 : Indicated	: 1937-41 : Average	: % 1946 Goal is of : 1945	: 1937-41 Average
(Thousands of Units)					
Food and Fiber Crops:					
Wheat, Bu.	1/ 895,375	1,149,825	858,288	78	104
Rye, Bu.	2/ 31,378	27,883	45,751	113	69
Rice, Bu.	65,220	71,774	53,149	91	123
Dry Beans, 100-lb. Bags, uncleaned.	16,763	14,191	16,395	118	102
Dry Peas, " "	3/ 5,564	5,793	2,510	96	222
Soybeans for beans, Bu.	177,108	190,646	76,253	93	232
Flaxseed, Bu.	32,191	35,648	19,576	90	164
Peanuts, Pick. & Th. (lbs.)	1,721,200	2,174,375	1,391,951	79	124
Cotton, running bales.	10,650	9,137	12,829	117	83
Broomcorn, tons	40	31	40	129	100
Sugar Beets, tons	12,091	9,155	10,757	132	112
Sugar Cane, tons	6,566	7,176	5,891	91	111
Potatoes, Irish, Bu.	377,913	430,773	361,218	88	105
Sweetpotatoes, Bu.	65,968	67,275	62,601	98	105
Truck Crops: Fresh, tons (eq.)	6,554	6/ 8,322	6,618	79	99
Processing, tons (proc. wt.)	3,090	3,229	2,008	96	154
Tobacco:					
Flue-cured, lbs.	1,153,400	1,187,505	846,693	97	97
Fire-cured, lbs.	71,610	60,010	95,583	119	75
Burley, lbs.	493,973	601,322	369,793	82	134
Dark air-cured, lbs.	43,669	45,910	39,918	95	109
Other, lbs.	180,164	155,715	159,917	116	113
Feed Crops:					
Corn, Bu.	3,135,707	3,073,966	2,582,151	102	121
Oats, Bu.	1,347,591	1,583,650	1,129,976	85	119
Barley, Bu.	264,201	277,246	285,540	95	93
Grain Sorghums, Bu.	131,600	106,985	77,075	123	171
All Tame Hay, tons	85,655	90,477	79,569	95	108
Hay Seeds 4/ Lbs. (Clean)	436,600	403,388	318,560	108	137
Cover Crop Seeds 5/ Lbs.	166,110	155,880	84,855	107	196

1946 LIVESTOCK GOALS: Numbers and Production with Comparisons

Livestock and Livestock Products	: Numbers and Quantity : Suggested : 1945	: 1937-41 : Average	: % 1946 Goal is of : 1945	: 1937-41 Average
(Thousands of Units)				
Milk Cows on farms (Av. for yr.)	---- 8/ 25,700	23,575	---	---
Milk Production on farms (mil. lbs.)	120,500 8/	123,000	98	112
Hens & Pullets on farms (Jan. 1)	408,063	469,161	87	108
Egg Prod. on farms (Mil. doz.)	3,910	4,577	85	120
Chickens Raised (farm prod.)	680,000	821,353	83	104
Turkeys Raised	39,700	44,150	90	129
Hogs: Sows to Farrow in Spring	8,360	8,204	102	111
Sows to Farrow in Fall	----	5,548	4,798	---
Pigs Saved--Spring	52,000	51,687	101	111
Pigs Saved--Fall	----	35,300	30,408	---
Cattle and Calves (Dec. 31)	78,600	80,200	98	117
Beef Cattle on farms (Dec. 31)	39,200	40,600	97	124
Sheep and Lambs on farms (Dec. 31)	44,800	44,800	100	86

1/ Acreage Goal times 13.0 bushels per acre.

2/ Acreage Goal times 12.2 bushels per acre. 3/ Includes 1,000,000 bags wrinkled peas. 4/ Includes alfalfa, red, alsike, sweet and ladino clover; and lespedeza. 5/ Includes hairy vetch, common and Willamette vetch, Austrian winter peas, crimson clover, and common ryegrass. 6/ Includes asparagus for processing, but not cabbage for kraut. 7/ Excludes sauerkraut and pickles. 8/ Estimated.

PROPOSED 1946 SUPPORT PRICES ON FARM PRODUCTS

The proposed 1946 support prices summarized in the commodity statement are necessarily contingent upon action by the Congress providing funds and authorizations for carrying out the program.

Generally announced in advance of the time when farmers must plant their crops or plan their livestock production, support prices are an integral part of the food production program. The relative levels at which these support prices are established constitute one of the more important devices available for encouraging the most desirable pattern of agricultural production.

The chief legislative bases for the support-price program are section 302 of the Agricultural Adjustment Act of 1938, as supplemented by section 8 of the act of October 2, 1942, and the so-called Steagall Amendment, or section 4 (a) of the act approved July 1, 1941, as amended by the act of October 2, 1942.

This legislation requires that the basic crops -- corn, cotton, wheat, rice, tobacco, and peanuts for nuts -- be supported at 90 percent of parity (92½ percent in the case of cotton) if marketing quotas have not been disapproved, regardless of whether a support at such level is necessary to obtain the needed wartime production. Prices must also be supported at not less than 90 percent of the parity or comparable price for any nonbasic commodity for which it has been found necessary to encourage a substantial expansion of production.

Since prices generally must be supported at about 90 percent of parity, it is necessary to establish support prices for some of the more urgently needed commodities at levels considerably above this level in order to assure prices attractive enough to obtain the necessary shifts in production.

The Secretary of Agriculture or the War Food Administrator has asked under the Steagall Amendment for an expansion in production of hogs, eggs, chickens (excluding chickens weighing less than 3½ pounds live weight and all broilers), turkeys, milk and butterfat, designated varieties of dry peas, designated varieties of dry beans, soybeans for oil, flaxseed for oil, peanuts for oil, potatoes, cured sweetpotatoes, and American-Egyptian cotton. The Department of Agriculture is directed to support the prices of these commodities as well as the basic commodities -- corn, cotton, wheat, rice, tobacco, and peanuts for nuts-- at not less than 90 percent of parity for a period extending until 2 years after the January 1 following the date on which the President or the Congress shall have proclaimed hostilities to have ended.

In addition to the commodities for which support prices have been formally proclaimed under the Steagall Amendment or for which loans are specifically required by legislation, support prices or loans are proposed for 1946 for a number of other commodities, including sugar beets, sugarcane, barley, grain sorghums, vegetables for canning, and a number of grass and legume seeds.

Support-price programs are carried out through purchase of commodities for military and other governmental uses, including purchases out of the 30 percent of the tariff revenues appropriated by section 32 of Public Law 320, Seventy-fourth Congress, or through loans, purchases, and other operations conducted by the Commodity Credit Corporation.

ORIGINAL ARTICLES

THE EFFECT OF THE INFLUENZA VIRUS ON THE RESPIRATORY SYSTEM
J. H. HAY, M.D., CHICAGO, ILL.

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WHEAT GOAL FOR 1946 CROP

Wheat requirements out of domestic production in 1946-47 are calculated to be about 887 million bushels, which is a substantial reduction from the 1,095 million bushel disappearance estimated for 1945-46. This reduction in requirements is largely a reduction in exports (including military relief feeding and War Food Administration shipments) and feed, which combined would be reduced from about 395 million bushels to 250 million bushels. It is also to be expected that there will be a reduction in military food and use for industrial alcohol. Civilian consumption per capita in 1946-47 is expected to continue at current levels of about 3.7 bushels per capita.

Wheat requirements for the year beginning July 1, 1946, are projected as follows, in million bushels:

<u>Food requirements</u>	<u>Million bushels</u>
Civilian	500
Non-civilian	<u>27</u>
Total	527
<u>Industrial and other non-food requirements</u>	
Feed	150
Seed	80
Alcohol	<u>40</u>
Total	270
<u>Exports and shipments</u>	100
<u>Total requirements</u>	897
<u>Stocks</u>	
Beginning of year <u>1/</u>	325
End of year <u>1/</u>	<u>325</u>
Net change	0
<u>Imports</u> <u>2/</u>	10
<u>Net requirements from 1946 domestic production</u>	887
<u>Acres required</u> <u>3/</u> (million acres)	68.2

Assuming a carry-over at the beginning and end of the 1946-47 marketing year of 325 million bushels and imports of low quality wheat of 10 million bushels, a 1946 crop of wheat of about 887 million bushels would be required. With an average yield of 13.0 bushels per seeded acre (the 1935-44 average), this requirement could be produced on 68.2 million acres. This compares with the goal for 1945 of 67.7 million acres, the prospective 1945 acreage of 68.6 million, the 1945 wartime capacity study of 68.2 million, and the 1937-41 average of 69.3 million.

1/ A carry-over July 1, 1946 of 325 million bushels is predicated on a 1945 crop 1,085 million bushels (June indication).

2/ Imports would be of low quality wheat, on which there is no import quota.

3/ Seeded acreage, assuming a national yield of 13.0 bushels, the 1935-44 average.

While an acreage of 68.2 million acres with average yields would give us what we need, it is also about as much as we can get and still maintain our acreage of oil-bearing crops, crops which will produce more feed per acre than wheat and summer fallow.

The encroachment of sorghums in the Southwest eased somewhat in 1945, which should increase the acreage available for winter wheat this fall. Promise of fairly good yields is indicated by the June crop report. Continued favorable prospects would tend to encourage an expansion in spring wheat acreage. The shortage of soft red winter wheat is an inducement to ask for as large or larger acreage in the soft red winter States as in 1945. However, feed will take a part of this maintained or increased production in those States.

It is believed that present wheat prices, and provisions for continued price supports, are adequate to attain the goal and that storage and other facilities will be reasonably adequate. Machinery will continue tight, particularly in the fall of 1945, but it is expected that machinery for harvesting the 1946 crop will be easier than for the 1945 crop. Under a labor shortage farmers tend to shift to the less intensive crops, such as wheat. Accordingly, even if the farm supply situation continues tight, it would be less of a deterrent to wheat production than to many other farm crops.

Suggested
Production Goals
1946

All Wheat: Suggested Planted Acreage for 1946, with Comparisons

State	: 1937-41 : : Average :	: 1943 :	: 1944 :	: 1945 : : Goal :	: 1945 : : Prospective :	: 1945 : : Wartime Capacity 3/ :	: 1946 : : Suggested :
T h o u s a n d A c r e s							
Maine	: 2	2	2	2	2	2	2
N. Y.	: 314	278	367	350	376	380 (352)	380
N. J.	: 72	62	75	75	90	73 (90)	90
Pa.	: 971	805	940	963	955	859 (925)	965
N.E.	: 1,359	1,147	1,386	1,390	1,423	1,314	1,437
Ohio	: 2,199	1,688	2,058	2,000	2,284	2,201 (2,200)	2,200
Ind.	: 1,741	1,003	1,338	1,380	1,668	1,348 (1,500)	1,500
Ill.	: 2,136	1,215	1,347	1,500	1,456	1,710 (1,550)	1,600
Mich.	: 855	677	971	900	981	902 (975)	950
Wis.	: 105	71	69	80	71	65 (70)	75
Minn.	: 1,900	1,162	1,329	1,125	1,191	1,340 (1,190)	1,190
Iowa	: 524	152	160	150	155	200 (150)	150
Mo.	: 2,390	1,270	1,714	2,500	1,800	2,650 (2,500)	2,250
S. Dak.	: 3,318	3,154	3,255	3,520	3,148	3,600	3,500
Nebr.	: 4,218	3,113	3,705	4,000	3,910	4,318 (4,000)	4,000
N.C.	: 19,386	13,505	15,946	17,155	16,664	18,334	17,415
Del.	: 75	59	68	65	71	65 (65)	70
Md.	: 412	304	401	410	413	410 (422)	410
Va.	: 594	482	574	575	574	575 (585)	575
W. Va.	: 152	99	113	130	114	140 (130)	115
N. C.	: 497	511	613	600	539	636 (636)	600
Ky.	: 517	379	512	525	558	475	525
Tenn.	: 452	375	491	600	511	525 (525)	525
E.C.	: 2,699	2,209	2,772	2,905	2,780	2,826	2,820
S. C.	: 201	261	290	325	284	325 (325)	290
Ga.	: 187	210	243	275	255	275 (275)	255
Ala.	: 7	14	18	20	19	20	20
Miss.	: 9 1/	12	25	25	30	25	25
Ark.	: 73	25	65	40	75	60	75
Okla.	: 5,324	3,800	5,206	5,800	5,779	5,800 (5,800)	5,800
Tex.	: 4,560	3,560	4,450	4,600	5,028	4,941 (5,200)	5,200
South.	: 10,361	7,882	10,297	11,085	11,470	11,446	11,665
N. Dak.	: 8,740	8,638	10,162	10,000	10,194	10,000	10,000
Kans.	: 14,641	10,741	13,103	13,500	13,626	12,300 (12,300)	13,500
Mont. 2/	: 4,161	3,751	4,201	3,900	4,099	4,000 (3,900)	4,000
Idaho 2/	: 1,101	851	1,038	1,100	1,162	1,119 (1,100)	1,100
Wyo.	: 276	239	262	325	268	325	300
Colo.	: 1,530	1,493	1,608	1,725	1,745	1,725 (1,575)	1,725
N. Mex.	: 390	349	334	373	374	373 (400)	375
Ariz.	: 40	25	26	26	27	35 (26)	27
Utah	: 273	240	292	300	306	305 (300)	300
Nev.	: 18	20	18	22	18	20	20
Wash. 2/	: 2,295	2,084	2,523	2,375	2,829	2,466	2,600
Oreg. 2/	: 970	764	961	950	1,046	925 (1,000)	1,000
Calif.	: 905	497	596	600	566	650 (700)	600
West.	: 35,340	29,692	35,124	35,196	36,260	34,243	35,547
U.S.Total							
Above	: 69,145	54,435	65,525	67,731		68,163	68,834
U.S.Total							
Planted	: 69,311	55,127	65,684		68,597		

1/ 1940-41 average

2/ Net planted acreage which excludes the acreage of abandoned winter wheat that is reseeded to spring wheat (for all columns except 1945 prospective acreage which is not yet available.)

Figures in parantheses are 1946 State adjustment committee suggestions.

Suggested
Production Goals
1946

RYE GOAL FOR 1946 CROP

The committee at first set up requirements for 1946-47 which would take a million more acres, but then brought them in line with the largest acreage which it seemed reasonable to obtain. The larger requirements called for the following, in million bushels: Food 9, feed 15, seed 8, alcohol and spirits 10, net exports 2, net increase in carry-over 3.2 (to 10), making total requirements 47.2 million bushels. With an average yield of 12.2 bushels per harvested acre, about 3.87 million acres would be needed.

If this larger requirement were to be met, it would involve an acreage expansion which would be far beyond possible attainment unless resort were made to price inducements, such as was made in the case of flax in 1945. Such action does not seem warranted considering the nature of the commodity and that wheat supplies will be ample to take care of bread-grain food requirements.

Rye requirements for the year beginning July 1, 1946, are projected as follows, in million bushels:

<u>Food requirements</u>	<u>Million bushels</u>
Civilian	9.0
Non-civilian	<u>0</u>
Total	9.0
<u>Industrial and other non-food requirements</u>	
Feed	12.0
Seed	7.5
Alcohol and spirits	<u>7.0</u>
Total	26.5
<u>Exports</u>	1.0
<u>Total requirements</u>	36.5
<u>Stocks</u>	
Beginning of year	6.8
End of year	<u>7.0</u>
Net increase	0.2
<u>Imports</u>	2.0
<u>Net requirements from 1946 domestic production</u>	34.7
<u>Acres required</u> 1/ (million acres)	2.8

Assuming a carry-over July 1, 1946 of 6.8 million bushels, imports of 2.0 million bushels, and a carry-over on June 30, 1947 of 7.0 million bushels, a 1946 crop of rye of 34.7 million bushels would be required. With an average yield of 12.2 bushels per harvested acre, about 2.8 million acres would need to be harvested to meet this requirement. This would be above the 1945 goal of 2.52 million acres, the prospective acreage for harvest in 1945 of 2.25 million, and the 1945 wartime capacity study of 2.55 million acres. It would be below the 1937-41 average of 3.7 million acres.

1/ Harvested acreage, assuming a national yield of 12.2 bushels, the 1935-44 average.

A careful analysis of acreages by States indicates that 2,785,000 acres might be obtained, which, if average yields were obtained, would approximate requirements. This acreage, however, is about the maximum that can be obtained. The reason for this is that any appreciable increase in rye production that would not be absorbed for feed locally would have to come in 7 or 8 principal states, Wisconsin, Minnesota, North Dakota, South Dakota, Nebraska, Kansas, Oklahoma -- geographically, the Great Plains States. In these States, rye has been declining in acreage since wheat restrictions were removed; they harvested 72 percent of the U. S. total rye acreage in 1942 and 59 percent in 1945. Rye can no longer compete with wheat yields per acre nor with wheat income per acre. Exceptions are on some of the poorer soils, particularly in sandy areas, where rye withstands blowing during winter better, such as in the sand hills of Nebraska. Wheat plant breeding work has outdistanced work with rye.

The opportunities for increasing rye acreage, instead of in the traditional location of the Great Plains States, appears more likely in some unusual places, such as in the eastern Corn Belt, the southwest, and some of the south-eastern and south Atlantic States. In these locations, additional rye acreage would not result in any significant additions to commercial rye supply, because it would be largely absorbed for livestock feed.

It is believed that present rye prices are probably adequate to attain the suggested goal, and that labor, machinery, storage and other facilities are adequate. However, to meet the goal it would be desirable and probably necessary to inform growers of the needed increase in acreage in 1946.

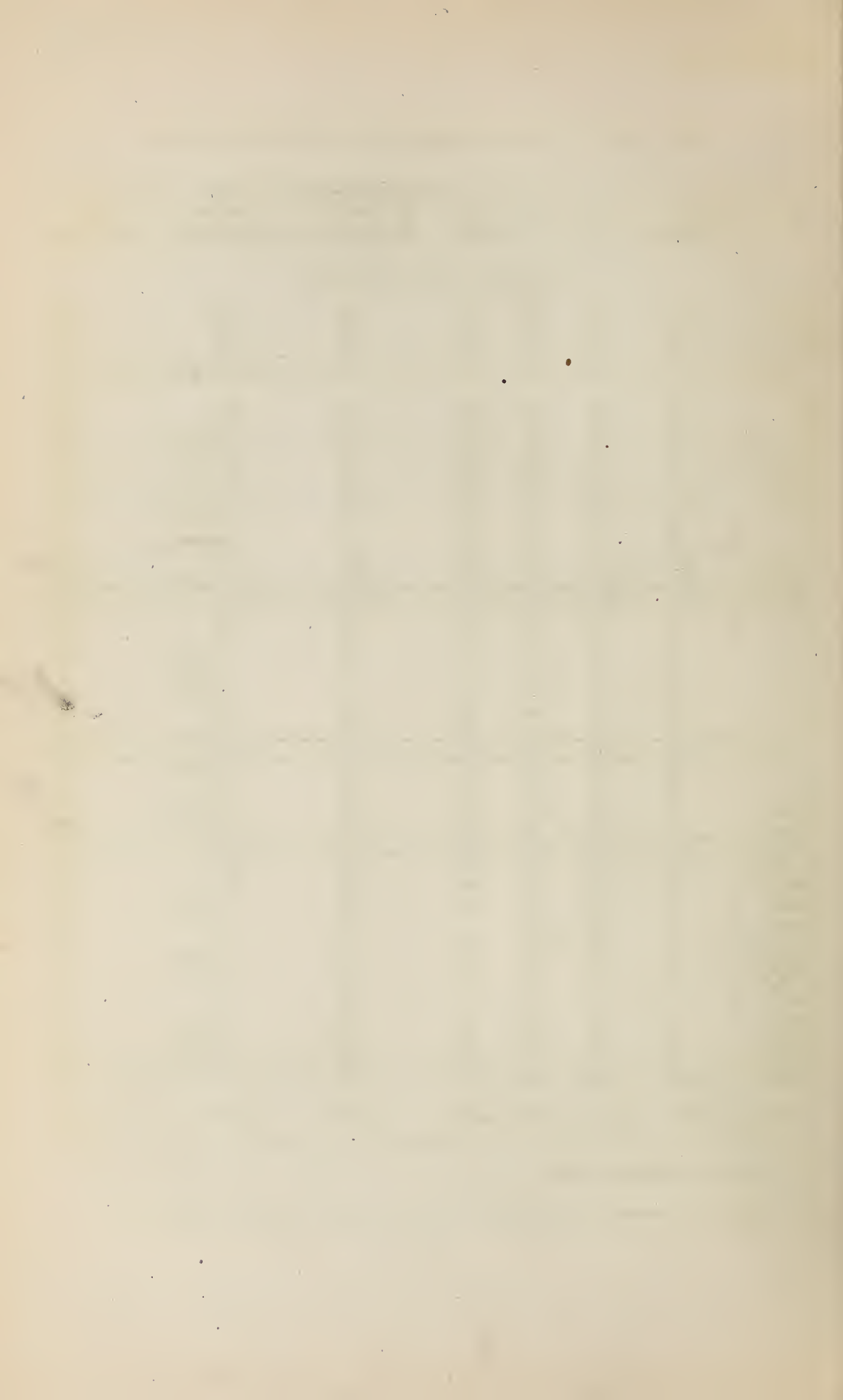
Suggested
Production Goals
1946

Rye: Suggested Harvested Acreage for 1946 With Comparisons

State	1937-41 Average	1943	1944	1945 Goal	1945 Indicated for harvest for grain 1/	1945 Wartime Capacity 2/	1946 Suggested
T h o u s a n d A c r e s							
N. Y.	21	15	15	15	19	15	25
N. J.	18	13	14	14	15	14	15
Pa.	60	48	49	60	37	45	55
N. E.	99	76	78	89	71	74	95
Ohio	53	76	38	60	31	60	55
Ind.	126	101	90	100	130	129	130
Ill.	84	59	66	60	69	70 (75)	75
Mich.	95	65	73	80	60	80 (75)	80
Wis.	242	109	100	105	90	100	110
Minn.	443	123	111	123	132	175 (175)	175
Iowa	90	13	10	10	16	13 (15)	15
Mo.	42	55	70	60	92	75	95
S. Dak.	637	522	392	450	349	400	450
Nebr.	354	421	328	410	380	439 (380)	410
N. C.	2,166	1,544	1,278	1,458	1,349	1,541	1,595
Del.	9	11	15	11	16	11	15
Md.	16	21	22	22	21	20	25
Va.	43	39	41	37	43	37 (40)	45
W. Va.	6	4	4	4	4	4 (4)	5
N. C.	52	35	38	35	31	34 (34)	35
Ky.	13	22	44	30	49	30	50
Tenn.	44	34	39	32	35	36	40
E. C.	183	166	203	171	199	172	215
S. C.	18	25	25	31	30	31 (31)	30
Ga.	22	19	20	20	22	20	25
Okla.	92	138	152	110	141	125 (140)	150
Texas	13	25	20	15	26	20	25
South	145	207	217	176	219	196	230
N. Dak.	834	349	192	325	145	325	325
Kans.	73	129	94	100	92	50	100
Mont.	43	29	28	40	15	40 (30)	40
Idaho	6	8	8	6	8	6	10
Wyo.	20	26	16	20	16	20	20
Colo.	55	126	69	60	52	60 (60)	60
N. Mex.	6	15	8	10	10	8	10
Utah	3	6	9	5	12	6	15
Wash.	19	30	15	20	12	20	20
Oreg.	37	34	30	25	36	25 (35)	40
Calif.	9	10	9	10	10	10 (10)	10
West	1,105	762	478	621	408	570	650
U. S.	3,700	2,755	2,254	2,515	2,246	2,553	2,785

1/ June 11, 1945 Crop Report

2/ Figures in parentheses are 1946 State adjustment committee suggestions



Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

RICE

Requirements: Upon a review of requirements for rice it was estimated that about 19,000,000 bags would constitute the need from the 1946 crop. This is made up of the following major items: Civilian--8,358,000; Military--500,000; Exports and Shipments--8,350,000; Seed--900,000; Non-food and Feed--843,000. It is questionable whether the requirement of one million bags for the liberated areas in the Exports and Shipments requirement would constitute an effective demand due to the uncertainty as to whether such claimants would be able to make satisfactory financial arrangements for purchase of rice in the U. S. or would be willing to purchase such rice at market prices which will exist for U. S. supplies. The remainder of the requirements for foreign claimants under Exports and Shipments are considered reasonable and likely to materialize.

It appears probable that supplies of rice in the Far East will increase after 1946 and that as a result requirements from the U. S. 1947 crop will likely be substantially reduced below prospective requirements for the 1946 crop. This would mean a reduction in acreage in 1947 and a consequent decrease in the seed requirement from the 1946 crop.

Production Capacity: State Production Adjustment Committees have submitted data indicating a production capacity of 1,530,000 acres for 1946, with capacities for individual States given as follows: Arkansas--280,000; Louisiana--600,000; Texas--400,000; and California--250,000. These estimates appear to represent maximum capacity and consider it questionable whether such a capacity could be maintained over an extended period of years without a substantial increase in capital investment for irrigation and other production facilities and without bringing new land under rice cultivation. Considerable rice land has been cropped continuously without normal rotation during the war period and it is believed that such intensive cultivation is not desirable in the future.

Suggested Goal: In view of the considerations with reference to requirements and production capacity, it is believed that provision should be made for the production of about 19,000,000 bags of milled rice which would require an acreage goal of 1,405,000 acres based on an average yield of 46.4 bushels per acre and a normal milling outturn from the rough rice. The yield of 46.4 bushels per acre is slightly in excess of the average yield for the past 5 years, but should be attained under normal weather conditions since the suggested acreage goal is somewhat less than planted acreages during the past 5 years. It is probable that any reduction in acreage would tend to be from the less productive land and therefore yields would be somewhat higher than the average of the past 5 years.

The recommended goal of 1,405,000 acres is the same as the 1945 goal acreage but is approximately 7 percent below the planted acreage in 1945. In breaking the goal down between the States, the State goals have been set at a uniform percentage below the 1945 planted acreage.

Labor and Production Supplies: It is expected that labor and production supplies will be fully adequate to meet the recommended 1946 goal since larger acreages were produced during the war period when labor and production supplies were less plentiful than they will be during 1946.

Marketing Facilities: Marketing facilities should be adequate to handle the crop from 1,405,000 acres which would provide a smaller production than in recent years when the crop was marketed without serious difficulty. Milling capacity is more than adequate to handle production from the 1946 goal since even during the war years most mills did not operate during the entire year.

Recommendations for Goal Achievement: In view of the present favorable prices for rice and apparent adequacy of production and marketing facilities, it is not believed that any special programs will be required to attain the recommended goal of 1,405,000 acres. In discussing goals with farmers, it is suggested that they be advised of the possibility of a reduced demand for U. S. rice from the 1947 crop since it appears probable that supplies of rice in the Far East will increase after 1946, thereby reducing requirements against the 1947 U. S. crop.

RICE: Suggested State Goals for 1946

State and Region	Suggested 1946 Goal:		Acreage		% Acreage Goal is of	
	Production : Acres		1945	1937-41	1945	1937-41
	: Indicated :		: Indicated :		: Indicated :	
	1,000 Bu.	1,000	1,000	1,000	Percent	Percent
Ark.	12,995	260	279	191	93	136
La.	20,585	540	579	507	93	107
Tex.	16,655	370	400	287	93	129
South	50,235	1,170	1,258	985	93	119
Calif.	14,985	235	253	133	93	173
West	14,985	235	253	133	93	173
U. S.	65,220	1,405	1,511	1,118	93	125

Proposed Price Support: Nonrecourse loans at 90 percent of the parity price as of August 1, 1946, will be made available to farmers and cooperative associations on rough rice produced in 1946 and stored on farms or in warehouses. The specific schedule of loan rates with differentials for location, variety, grade, and milling quality will be announced at a later date. The loans will be available from September 1, 1946 to February 28, 1947. They will mature on June 30, 1947 in southern States and on July 31, 1947 in California, or earlier upon demand.

Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

DRY EDIBLE BEANS

Requirements: Requirements for dry edible beans in 1946-47, including an allowance for seed for planting in 1947 and a small increase in July 1947 carry-over, have been estimated at 15,350,000 bags of 100-lbs., cleaned basis. By claimants or by use, this requirement is made up as follows:

	<u>1,000 bags, cleaned</u>
U. S. Civilians	12,125
Military, Exports and Shipments	1,800
Seed	1,400
Stocks, July 1, 1947	1,500
Total	<u>16,825</u>
Less Carry-in July 1, 1946	<u>1,475</u>
Net Requirement	15,350

Production of this quantity and distribution in accordance with the above requirements would allow for civilians about the same per capita consumption as in the 5-year period 1935-39, i.e. about 8.7 pounds per person. The total quantity allowed for civilians is greater than in 1935-39, due to increase in population.

In viewing prospects for exports from the United States at this time, it appears that in 1946-47 only normal quantities may be shipped to Puerto Rico, other possessions and exported to Cuba; also a small amount may be required to meet the seed demand. It is estimated these requirements together with military will total about 1.8 million bags.

The domestic seed allowance provides sufficient beans to plant about 2,000,000 acres in 1947 at an average U. S. seeding rate of 43 pounds per acre and to plant commercial, farm, and city gardens in 1946.

Stated requirements by classes appear to be out of line with the nation's capacity to produce the various classes under the normal balance of production, and out of line with obtainable production under reasonably normal price relationships among the classes. Requirements by classes, compared to the nation's estimated capacity to produce are as follows in approximate figures:

Claimant	: All : Classes	: White : Classes	: Red : Pinto	: Other : Kidney	: Other : Classes
	<u>1,000 100-lb. Bags, Cleaned</u>				
U. S. Civilians	12,125	7,900	1,800	700	1,725
Military, Exports and Shipments	1,800	1,170	0	420	1/ 210 1/
Seed	1,400	560	140	30	670
Total	<u>15,325</u>	<u>9,630</u>	<u>1,940</u>	<u>1,150</u>	<u>2,605</u>
Increase in stocks	25				
Estimated Capacity to Produce	15,350	9,800	2,500	850	2,200

1/ Division between the indicated classes for Exports and Shipments estimated by the committee.

Recent history indicates that white and pinto bean production can be obtained in excess of stated requirements, while for red kidneys and "other classes" the opposite appears to be true. Therefore, the committee proposes a 1946 acreage goal that should produce about the normal balance of classes within the total requirement of 15,350,000 bags. The suggested acreage goal is also in line with the estimated acreage capacity.

Acreage Goals: Production of the total requirement of 15,350,000 bags (cleaned basis) or about 16.5 million bags (uncleaned) with an average yield of 831 pounds per acre (the U.S. 5-year average 1937-41 or 1940-44) would require the seeding in 1946 of 2 million acres. This compared with 1,976,000 acres seeded in 1945 (July 1 Crop Report) which also is about the 1937-41 average seeded acreage. To attain this goal and the suggested balance of classes based on capacity, the committee suggests an acreage distribution among the various States as shown in the following table:

DRY EDIBLE BEANS: Suggested State Goals for 1946

State	Suggested 1946 Goal		Acreage		% Acreage Goal is of	
and/or	Production	Acreage	1945	1937-41	1945	1937-41
Region	(Uncleaned)		Indicated		Indicated	
Production	1,000 100-lb.	1,000	1,000	1,000	Percent	
	bags					
Maine	55	5	5	9	100	56
Vt.	6	1	1	2	100	50
N.Y.	1,046	125	108	156	116	80
N.E.	1,107	131	114	167	115	78
Mich.	4,998	600	603	571	100	105
Minn.	28	5	6	3	83	167
Nebr.	616	50	53	24	94	208
Wis.	5	1	1	3	100	33
N. C.	5,647	656	663	601	99	109
Tex.	7	5	5	-	100	-
South	7	5	5	-	100	-
Ariz.	20	14	15	14	93	100
Calif.	4,616	350	327	371	107	94
Colo.	1,463	350	348	378	101	93
Idaho	1,832	125	117	116	107	108
Kansas	-	-	-	1	-	-
Mont.	229	18	18	19	100	95
N. Mex.	785	260	271	238	96	109
N. Dak.	5	1	1	-	100	-
Oreg.	7	1	1	2	100	50
Utah	31	5	5	6	100	83
Wash.	42	4	4	3	100	133
Wyo.	972	80	87	60	92	133
West	10,002	1,208	1,194	1,208	101	100
U.S.	16,763	2,000	1,976	1,977	101	101

Suggested acreages in California and New York call for the greatest increases in 1946. State workers in these States have indicated the possibility of expansion to the extent suggested. The proposal to establish the Michigan goal below estimated capacity is based on likely increases in sugar beet acreage in 1946 and on the fact that Michigan bean yields and quality in the past few years have been abnormally low. To a lesser extent the same applies to Colorado. It is necessary that a concerted educational program be undertaken if this level of production is attained.

Proposed Support Price: The price support program for the 1946 crop of dry beans will be announced at a later date.

Nov. 23, 1945

DRY EDIBLE PEAS

Dry smooth peas and dry wrinkled peas are considered separately in this report, inasmuch as the principal uses of the two types differ. The smooth classes are desired for human food in dry form. The wrinkled types of peas are more desirable for food in green form, either fresh, canned, or frozen. Wrinkled pea seed amounting to 1 to 1.1 million bags will be needed. The seed will be used for garden peas and canning pea acreages.

Smooth Peas

Dry smooth peas are produced mostly in the Palouse area of Washington and Idaho and in Umatilla County of Oregon. Reserve stocks will have disappeared by July 1, 1946, due mainly to a short supply of beans which has caused a substitution of peas for the beans requested.

Uncertainty, however, surrounds 1946-47 requirements for U. S. dry smooth peas. This arises from the fact that no foreign claimants have stated requirements beyond June 30, 1946, and very few beyond December 31, 1945. Domestic requirements are the only ones which might be assumed to be estimated with any degree of certainty at this time. Domestic requirements for dry peas, of course, are small compared to quantities produced for shipment out of the country during the war years. For example, the following are the stated requirements for the current year 1945-46:

Requirements 1945-46

Civilians	1,275.0
Military and War Services	551.7
Lend-lease, Liberated Areas and Exports	10,373.1
U. S. Seed	1,200.0 <u>1/</u>
Export Seed	50.0
Total	13,449.8

Supplies 1945-46

Carry-in July 1, 1945	3,036
Crop (Estimated clean basis - Sept. Crop Report, BAE)	<u>4,370</u>
Total	7,406

1/ Assumes 500,000 bags for processing and garden pea seed and 700,000 bags to plant a 1946 dry pea goal of 500,000 acres at 140 pounds of peas per acre.

Civilian food and seed requirements and an estimated carry-out of 400,000 bags are on a firm basis. Subtracting the relatively firm requirements for civilians, military, and expected carry-over from the estimated 1945-46 supply of 7,406,000 bags leaves about 4,029,000 bags to meet an export requirement as originally stated of over 10,000,000 bags.

General statements are available to the goal committee indicating that some U. S. peas will be required for use in foreign countries in 1946-47, but quantities are not specified. UNRRA has stated that it will take "all the peas that can be produced." However, the committee feels that with the war over in Europe, agricultural crop production in those countries should be well on the way to recovery in 1946, so that needs for dry peas from the U. S. for relief feeding in Europe should not be as great in 1947 as in 1946.

Little is known at this time about relief needs or other conditions in the Pacific theatre, but the committee feels justified in raising considerable question about the extent to which people of the Pacific will desire dry peas in one and one-half to two years from now. The earliest possible time of arrival of 1946 peas from the United States to those distant areas would be late 1946 or early 1947. According to data from the Office of Foreign Agricultural Relations, China produced and apparently consumed most of an average of more than 45 million bags of 100 pounds each of peas during the five-year period 1939-43.

Despite UNRRA's stated willingness to accept unlimited quantities of peas from the United States as late as 1947, the committee feels that a reasonable compromise between domestic needs which are known and maximum production which UNRRA calls for would be the most justifiable course of action to take at this time. Such a compromise, in our opinion, would call for a production somewhat below current levels. With average production conditions 400,000 acres of dry smooth peas should provide an amount sufficient to meet requirements. About 2,500,000 bags of peas would be available for export and military and war services.

Requirements 1946-47

Civilian	1,000	
Military and War Services	552	1/
U. S. Seed	920	2/
Export Seed	50	
Carry-out	200	3/
Available for export	1,953	
Total	4,675	

Supplies 1946-47

Carry-in	400	
Crop (Estimated clean basis	4,275	5/
Total	4,675	

- 1/ Assumes that 1946-47 requirements might be equal to 1945-46 requirements and that decreased requirements in Europe will be offset by increased requirements in the Pacific.
- 2/ Assumes 500,000 bags for processing and garden pea seed and 420,000 bags to plant a postwar acreage of 300,000 acres believed to be desirable.
- 3/ 200,000 commercial stocks. No government stocks.
- 4/ Supply minus firm requirement.
- 5/ Estimated 1946 crop from a smooth pea goal of 400,000 planted acres. Yield 1172 pounds per acre, 91.2 percent clean.

A goal of 400,000 acres of smooth peas is suggested. Such an acreage can be grown in established rotations without soil injury and represents about the best balance in use of land and a minimum of other crop displacement.

Labor, machinery, and marketing facilities are probably adequate to handle the crops from more than 750,000 acres if expanded acreages were confined to recognized growing areas. Processing and marketing difficulties have been experienced each time production has been attempted in new areas.

Because of the almost continued use of their land during recent years for the production of soil-depleting cash crops resulting in decreased fallowing and other moisture and soil conservation practices, and because of the relatively high income derived from both wheat and peas, growers are indicating a reluctance to continue to plant continued large acreages to dry peas. Thus, unless it is more clearly demonstrated that the large foreign requirements are firm and essential, this committee is unwilling to ask growers to plant more than 400,000 acres to dry smooth peas in 1946.

Wrinkled Peas

In addition to smooth peas, it is estimated that approximately 1,000,000 bags of wrinkled peas will be required for 1947 plantings of processing and garden peas. This assumes some reduction in the processing levels as well as in market and city gardens. About 90,000 acres will be required. No specific acreage is recommended since most of this type of peas is produced under commercial growers' contracts. It is recommended, however, that growers be advised to secure growing contracts before planting acreages to wrinkled peas.

Suggested Goal

Goals for all dry peas are recommended for the six leading pea-producing States: Washington, Idaho, Oregon, Montana, Colorado, and North Dakota. It is expected that some acreages will be planted in other States. However, such plantings should not be encouraged since facilities for handling the crop probably will not be available for more than normal plantings in such States.

DRY PEAS - Suggested State Goals for 1946

State	Suggested 1946 Goal			Acreage			% Acreage Goal		
	Production			(All Peas)			(All Peas) is of		
	Smooth	1/ Smooth	Total	1937-	1944	1945	1937-	1944	1945
	Peas	Peas		1941		Ind.	1941		Ind.
	-	thousands	-	-	thousands	-	-	percent	-
Michigan	--	--	--	7	--	--	--	--	--
Wisconsin	--	--	--	7	3	3	--	--	--
North Dakota	75	8	8	--	11	11	--	73	73
Montana	35	3	28	21	40	28	133	70	100
Idaho	1,295	115	150	62	225	158	242	67	95
Wyoming	--	--	--	--	1	2	--	--	--
Colorado	200	40	40	44	46	46	91	87	87
Washington	2,645	214	239	135	349	258	177	67	91
Oregon	304	20	25	4	52	38	625	48	66
Total	4,554	400	490	280	727	544	173	67	89

1/ Uncleaned, 100-lb. bags.

Price Recommendation.

Support prices for dry smooth peas at 90 percent of the comparable price as of July 1, 1946 will be provided growers in accordance with the Steagall Amendment. An indication of what that support may be is that 90 percent of parity on August 15, 1945 would reflect an average of \$3.25 per hundred pounds of peas, thresher run, which, after normal cleaning, would grade U.S. No. 1.

Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion,
Purposes Only

OILCROPS

Summary: The requirement for soybean oil in 1946-47 to meet unrestricted demand at approximately the 1945 level of prices is estimated at 1,300 million pounds, equivalent to 145 million bushels of soybeans for crushing and export. Other requirements for soybeans would bring the total requirement to about 190 million bushels. Total requirements for peanuts are estimated at 1,720 million pounds or 860,000 tons, farmers' stock, with edible requirements about 5 percent less than in 1944-45.

Unrestricted demand for all drying oils in 1946-47 is estimated at one billion pounds, which would be second only to the record consumption in 1941. Of this total, approximately 72 percent would be linseed oil compared with 67 percent linseed oil in 1935-39. A total crush of 37 million bushels of flaxseed would be needed, or a total new supply of 42 million gross bushels including an allowance for seed and loss. Imports may not be greater than 10 million bushels. A domestic flaxseed production of 32 million bushels will be needed.

Production capacity for oilcrops is in excess of the goals suggested.

The suggested goal for soybeans is 177 million bushels from 9,500,000 acres harvested for beans. The suggested goal for peanuts is 1,720 million pounds (860,000 tons), farmers' stock, from 2,500,000 acres picked and threshed. The suggested goal for flaxseed is 32 million bushels from 4,200,000 planted acres.

No serious labor, production, or marketing problems are anticipated in meeting the goals suggested.

SoybeansRequirements:

1. Population, including military, 142.2 million.
2. National income 130 to 140 billion dollars.
3. Demand for edible fat at 1945 prices, at least 50 pounds per capita or 34 pounds per capita excluding butter. This would mean a total domestic demand, excluding butter, of at least 4,835 million pounds of refined edible oils and fats.
4. Exports and shipments of about 550 million pounds, of which 450 million pounds would be lard. This would be larger than the 1937-41 average of 354 million pounds of edible fats and oils (excluding coconut oil, palm oil, and copra), but would be less than in 1945-46.
5. Non-food uses of edible oils, including refining foots and loss, 280 million pounds.
6. Total requirements for edible fats and oils, excluding butter:

Domestic consumption, refined	4,835
Exports and shipments	550
Non-food uses, foots and loss	280
Total	5,665 mil. lb.

7. Prospective supplies:

- (1) Imported oils used in edible products,
-
- 1946-47 with comparisons

Calendar year				:	
Average :				:	1946-47
1937-41 :	1943	:	1944	:	probable
Million	Million	Million	Million		
pounds	pounds	pounds	pounds		
513	85	122	250		

- (2) Domestic production, 1946-47 with comparisons

Item	Calendar:		Crop year		
	year	:	1945-46	1946-47	
	average :	1943-44	1944-45	pre-	probable
	1937-41 :			liminary	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Lard	1,964	3,430	2,222	2,300	2,300
Edible tallow and					
edible oils ex-					
cept soybean oil :	1,933	1,804	1,844	1,675	1,815
Soybean oil.....	419	1,219	1,340	1,300	1,300 1/
Total	4,316	6,453	5,406	5,275	5,415

Compiles from reports of Bureau of the Census and USDA.

1/ Balance required to provide total new supply of 5,665 million pounds, assuming stocks would be the same at end of crop year as at the beginning.

8. Requirements for crude soybean oil in 1946-47, on the basis of the above estimates, would total 1,300 million pounds, the difference between estimated total requirements for edible fats and oils other than butter (5,665 million pounds) and the sum of probable imports and production of edible fats and oils, excluding soybean oil.

Production Capacity: The production capacity for soybeans considered alone is higher than the suggested acreage goal, which is less than the acreage harvested in recent years. However, in view of large requirements for other intertilled crops it will be difficult to exceed the goal suggested for 1946.

Suggested Goal: The suggested goal is 9,500,000 acres of soybeans for beans. This goal is nearly the same as that recommended in the State reports, but is 1,100,000 acres less than the acreage indicated to be harvested in 1945.

With an average yield of 18.6 bushels per acre, this acreage would produce about 177 million bushels of soybeans. Allowing 45,000,000 bushels for use as seed, feed, full-fat flour, other food uses, and loss, the remaining 132 million bushels would produce approximately 1,190 million pounds of soybean oil, including the oil-equivalent of soybeans for export, if any. This production would be about 110 million pounds less than the estimated requirement. A yield of about 9 pounds of soybean oil per bushel is assumed. This is slightly above the average yield for the past few years when a much larger percentage of the crop was crushed in less efficient mills than is probable in 1946-47.

Proposed Support Price: The price support program for the 1946 crop of soybeans will be announced at a later date.

SOYBEANS FOR BEANS: Suggested State Goals for 1946						
State and Region	1946 Goal	Acreage (Harvested)		% Acreage Goal is of		
		1945	1945	1945	1945	1945
	Production	Acres	Indicated	1937-41	Indicated	1937-41
		Sept. 1				
	1,000 bu.	1,000	1,000	1,000	Percent	Percent
N. Y.	130	9	6	9	150.0	100.0
N. J.	160	11	10	1/	110.0	183.3
Penna.	480	30	20	10	150.0	300.0
N. E.	770	50	36	23	138.9	217.4
Ill.	67,725	3,150	3,564	1,803	88.4	174.7
Ind.	23,400	1,300	1,432	618	90.8	210.4
Iowa	34,125	1,750	1,905	549	91.9	318.8
Mich.	1,500	100	110	55	90.9	181.8
Minn.	4,500	300	380	37	78.9	810.8
Mo.	9,750	650	718	101	90.5	643.6
Nebr.	350	25	23	7	108.7	357.1
Ohio	22,000	1,100	1,189	439	92.5	250.6
S. Dak.	195	15	16	2/	93.8	750.0
Wisc.	620	40	41	16	97.6	250.0
N. C.	164,165	8,430	9,378	3,624	89.9	232.6
Del.	325	25	28	24	89.3	104.2
Id.	325	25	26	15	96.2	166.7
Va.	980	70	102	42	68.6	166.7
W. Va.	25	2	2	1	100.0	200.0
N. C.	1,760	160	174	161	92.0	99.4
Ky.	715	55	65	24	84.6	229.2
Tenn.	980	70	77	20	90.9	350.0
E. C.	5,110	407	474	287	85.9	141.8
Ala.	150	25	38	13	65.8	192.3
Ark.	2,925	225	250	71	90.0	316.9
Ga.	84	13	12	15	108.3	86.7
La.	312	25	24	15	104.2	166.7
Miss.	840	70	87	39	80.5	179.5
Okla.	35	5	5	2	100.0	250.0
S. C.	56	8	8	10	100.0	80.0
Texas	16	2	2	3	100.0	66.7
South.	4,418	373	426	168	87.6	222.0
Kans.	2,585	235	275	19	85.5	1,236.8
N. Dak.	60	5	7	-	71.4	- -
West.	2,645	240	282	19	85.1	1,263.2
U. S.	177,108	9,500	10,596	3/ 4,121	89.7	230.5

1/ 1938-41 Average

2/ 1940-41 Average

3/ Does not equal sum of State averages because of short-time averages.

Peanuts

Requirements: Consumption of peanuts in the past three seasons has averaged approximately 1,350 million pounds for edible purposes, farmers' stock equivalent, or 675,000 tons. The 1944-45 demands exceeded those of 1942 and 1943 by about 5 percent. On the basis of recent history, it is estimated that approximately 650,000 tons farmers' stock peanuts will be needed from the 1946 crop for cleaning and shelling. This is about the same amount that was consumed from the 1942 crop, but about 5 percent less than consumption from the 1944 crop.

Requirements for seed, feed, and local use from the 1946 crop will amount to approximately 190,000 tons compared with about 200,000 tons in recent years.

Weather conditions would largely determine the yield of farmers' stock peanuts and also the quantity that would be unfit for edible uses and would have to be crushed. Approximately 20,000 tons of farmers' stock peanuts probably would be of low grades suitable only for crushing. A total of 860,000 tons of farmers' stock peanuts would be needed from production of the 1946 crop.

There will be about 10 million pounds of peanut oil produced from the usual shelling oil stock. In addition, damaged farmers' stock peanuts would be crushed.

<u>Production</u> <u>Farmers' Stock</u> <u>(tons)</u>	<u>Disposition</u>
650,000	Shelling and cleaning
190,000	Seed, feed, and local use
<u>20,000</u>	Low grades suitable only for crushing
860,000	Total production

Production Capacity: In view of the fact that during the past three years the acreages harvested for picking and threshing have been well over the suggested goal, it is obvious that production capacity will exceed the suggested goals.

Suggested Goal: A national goal of 2,500,000 acres picked and threshed, is recommended for the 1946 crop. This goal will provide sufficient peanuts to meet probable edible requirements.

Labor and Production Supplies: It is assumed that the supply of labor will be fairly adequate for the production of the 1946 crop. This is due to the fact that the boys are being discharged from the armed forces and the termination of war plant employment. It is also assumed that more machinery will be available for producing the 1946 crop.

Marketing Facilities: Facilities for the marketing of the 1946 crop should be ample. Marketing facilities during the last two or three years have been satisfactory and no change is contemplated for the 1946 crop.

Proposed Support Price: The price support program for the 1946 crop of peanuts will be announced at a later date.

PEANUTS: Suggested State Goals for 1946

State and Region	Suggested 1946 Goal	Acreage (picked and threshed) 1945	Acreage (picked and threshed) 1937-41	% goal is of 1946	% goal is of 1946	Goal (Acreage grown alone)
	1,000 lbs.	1,000	1,000	Per-cent	Per-cent	1,000
Va.	166,750	145	164	88.4	100.0	150
N. C.	278,400	240	312	76.9	99.6	255
Tenn.	5,250	7	8	87.5	100.0	10
E. C.	450,400	392	484	81.0	99.7	415
Ala.	266,000	380	458	83.0	128.4	575
Ark.	3,700	10	12	83.3	52.6	40
Fla.	57,600	90	112	80.4	109.8	225
Ga.	571,050	810	1,049	77.2	129.8	1,000
La.	1,850	5	6	83.3	50.0	25
Miss.	9,800	20	26	76.9	74.1	35
Okla.	72,850	155	255	60.8	262.7	200
S. C.	18,750	30	40	75.0	176.5	40
Tex.	266,200	605	796	76.0	207.9	692
Sou.	1,267,800	2,105	2,754	76.4	147.7	2,832
Other	3,000	3	---	---	---	3
U. S.	1,721,200	2,500	3,238	77.2	137.5	3,250

Flaxseed

Requirements: U. S. requirements for linseed oil in 1946-47, with unrestricted use, are estimated at about 715 million pounds, equivalent to 37 million bushels of flaxseed for crushing. Total drying-oil requirements are estimated at one billion pounds, second only to the very large use in 1941, a year of heavy wartime construction. With increased direct military use, but restricted civilian use, total utilization of all drying oils declined to about 860 million pounds in 1944 and 1945. Although direct military use will drop off sharply, building activity and industrial production are expected to be at high levels in 1946-47 and total use of drying oils would be greater than at present. Increased supplies of tung and other oils, however, will tend to limit the increase in the demand for linseed oil. The requirement for linseed oil is set at 71.5 percent of the total requirement for all drying oils compared with a linseed-oil utilization amounting to 67 percent of the total for all drying oils in 1935-39.

FLAXSEED: Domestic utilization of drying oils, 1935-45
and estimated requirements 1946-47 crop year 1/

Item	Calendar year							1945	1946
	1935-39	1940	1941	1942	1943	1944	2/	47	
								4/	
	Million lbs.								
Linseed oil	519	590	816	832	783	702	675	715	
Tung oil	118	67	69	11	10	10	25	90	
Perilla oil	62	20	9	4	2	3/	3/	5	
Fish oil	38	46	56	26	27	40	44	50	
Soybean oil	20	37	50	26	21	19	25	50	
Castor oil	7	25	46	53	17	80	70	70	
Oiticica oil	6	16	37	9	2	11	18	20	
Other	4	3	4	2	2	1	1	--	
Total	774	804	1,087	963	864	863	858	1,000	

1/ Total domestic disappearance of linseed, tung, perilla, and citicica oils; reported consumption (Census) in drying-oil products for other oils.

2/ Partly forecast (Oct. 1945).

3/ Less than 500,000 pounds.

4/ Estimated requirement; cropland year, unrestricted use.

The indicated requirement of about 715 million pounds of linseed oil is equivalent to 37 million bushels of flaxseed for crushing, or a total of 42 million gross bushels including an allowance for seed and loss. Perhaps no more than 10 million bushels of this total would be imported compared with normal prewar imports of 17 or 18 million bushels. Flaxseed production in Argentina, the principal source of imports, has been at relatively low levels in the past 2 years, partly because of adverse growing conditions and partly because of the low price paid to producers.

Production Capacity: Since flaxseed acreage in 1943 under wartime conditions was in excess of the goal suggested here, there is no question that there is sufficient production capacity.

Suggested Goal: Based on providing insurance against less than average imports -
32 million bushels or 4.2 million planted acres.

Marketing Facilities: Marketing facilities are adequate for the maximum flaxseed crop that could be produced under the suggested acreage. There will be adequate labor and production supplies for the acreage goals suggested here.

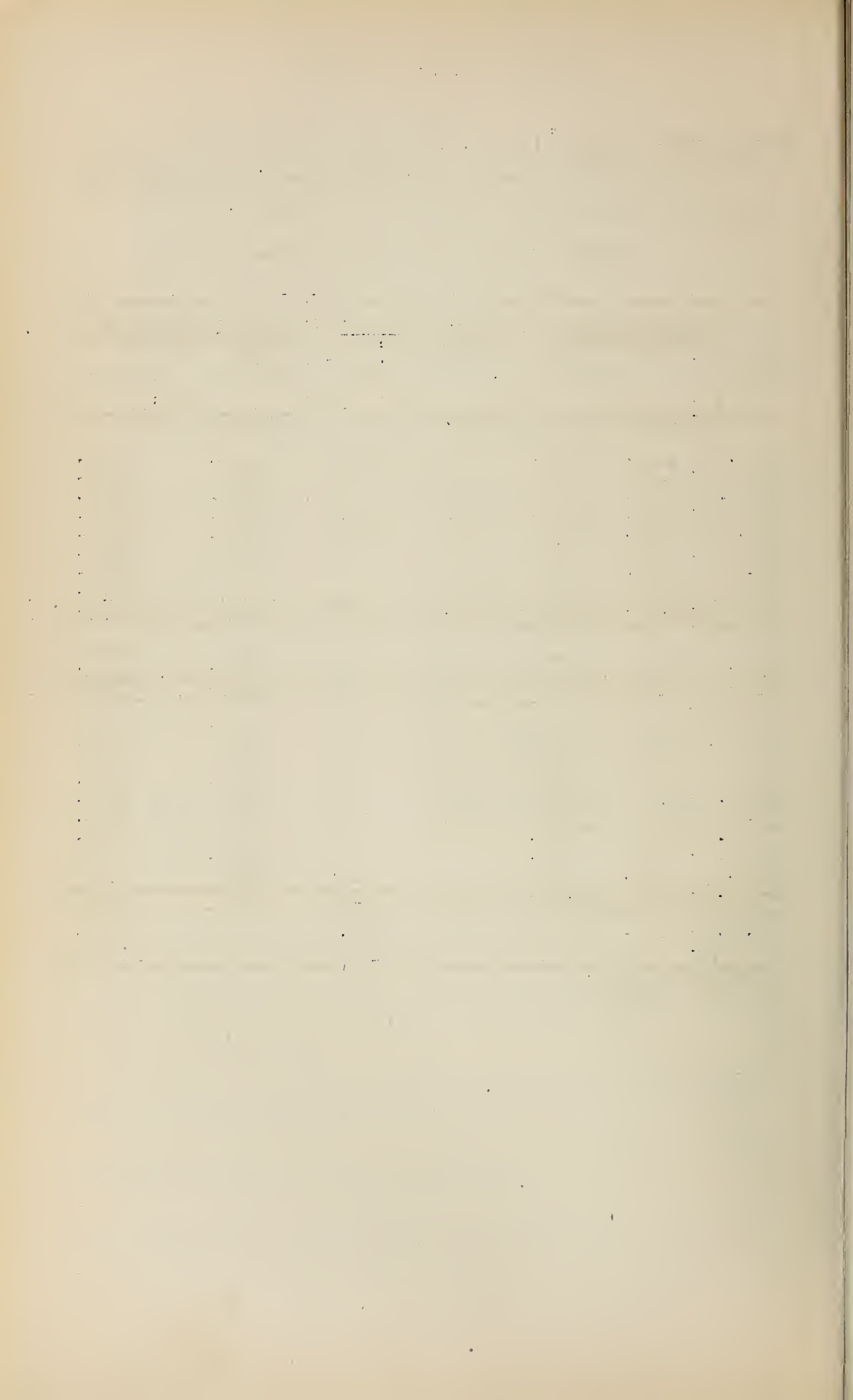
Proposed Support Price: Returns to growers from the flaxseed crop harvested in 1946 will be supported, by acreage payments or otherwise, at an average level equivalent to \$3.60 a bushel, Minneapolis basis. The exact method by which farmers will be assured of this average return will be determined and announced before 1946 crop flax begins to move to market.

FLAXSEED: Suggested State Goals for 1946

State and Region	Suggested 1946 goal:		Acreage (planted):		% Acreage Goal is of	
	Produc- tion	Acreage :(planted)	1945 Indicated	1937- 41	1945 Indicated	1937-41
	: 1,000 bu.	1,000	1,000	1,000	Percent	Percent
Ill.	: 67.5	5.0	2	1/ 18	250.0	27.8
Iowa	: 1,500.0	150.0	123	128	122.0	117.2
Mich.	: 85.0	10.0	8	8	125.0	125.0
Minn.	: 12,780.0	1,420.0	1,197	1,053	118.6	134.9
Mo.	: 82.5	15.0	15	5	100.0	300.0
Nebr.	: 28.0	4.0	2	2	200.0	200.0
S. D.	: 3,450.0	460.0	459	171	100.2	269.0
Wis.	: 110.0	10.0	9	8	111.1	125.0
N. C.	: 13,103.0	2,074.0	1,315	1,382	114.3	150.1
Okla.	: 137.5	25.0	40	10	62.5	250.0
Tex.	: 700.0	100.0	65	2/ 33	153.8	303.0
Sou.	: 837.5	125.0	105	30	119.0	416.7
Ariz.	: 310.0	15.5	16	2/ 11	96.9	140.9
Calif.	: 2,145.0	130.0	117	111	111.1	117.1
Idaho	: ---	1.0	---	6	---	16.7
Kans.	: 1,056.0	176.0	109	107	161.5	164.5
Mont.	: 1,012.5	225.0	343	91	65.6	247.3
N. D.	: 8,700.0	1,450.0	1,640	564	88.4	257.1
Oreg.	: 10.0	1.0	2	4	50.0	25.0
Wash.	: 10.5	1.0	1	6	100.0	16.7
Wyo.	: 6.8	1.5	1	---	150.0	---
West.	: 13,250.8	2,001.0	2,229	896	89.8	223.3
U. S.	: 32,191.3	4,200.0	4,149	2,307	101.2	182.1

1/ 1940-41 average.

2/ 1939-41 average.



Suggested
Production Goals
1946

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COTTON

Requirements:Upland

The requirements for upland cotton in 1946-47 are estimated at approximately 9,800,000 running bales. This figure is computed by taking into account probable domestic consumption and exports in 1946-47, working stocks (40 percent of 1946-47 disappearance), and the estimated carry-over on August 1, 1946, by qualities. It is based on the following considerations:

(1) That domestic consumption in 1946-47 will total about 8,500,000 running bales as compared with an estimated consumption of 9,000,000 in 1945-46 and actual consumption of 9,484,000 in 1944-45. Domestic mills are currently (September 1945) operating at an annual rate of about 9,000,000 bales and the rate of consumption seems likely to increase in the near future but may decrease late in the season. There are large unfilled requirements for cotton goods to supply domestic and foreign needs and to replenish depleted stocks of textiles in channels of distribution. The principal hindrance to further increases in consumption appears to be labor shortages in textile mills. It is reasonable to expect some decline in consumption as consumer needs are filled and textile supplies and distribution approach more nearly a normal basis. The extent of any such decline during 1946-47 will depend in large part upon the level of industrial activity and consumer purchasing power.

(2) That exports of upland cotton in 1946-47 will total 3,500,000 running bales against an estimate of 3,000,000 in 1945-46 and actual exports of about 2,000,000 in 1944-45. The quantity of cotton needed for export in 1946-47 is extremely uncertain. The foreign need for cotton is large but the effective demand in many consuming countries will depend upon the availability of exchange, funds available to supply cotton for relief shipments, and various other factors that cannot be foretold with much certainty at this time. It now seems likely that exports will be considerably larger in 1945-46 than in the previous year. Credit arrangements are being completed for substantial shipments of American cotton to European countries and there seems to be a possibility of moving some low-quality cotton to the Orient and possibly to Germany. Only a small part of the latter is taken into account in estimating requirements. This may provide a means of reducing the surplus of low grades and short staples accumulated in this country during the war years. Stocks of foreign growths of cotton are large and if American cotton is to be exported, on a price basis, export payments will need to be continued. Payments probably will have to be at higher rates than the current 4 cents per pound. It is assumed that payments will be made through 1946-47 in amounts sufficient to make export prices of American cotton competitive with those for foreign growths. If this is so and credits and relief funds are available in 1946-47, it is reasonable to expect export requirements for upland cotton to be somewhat larger than in 1945-46.

(3) That disappearance (consumption plus exports) together with needs for working stocks will be approximately 16,800,000 bales in 1946-47. Working stocks are computed as 40 percent of total disappearance.

(4) That the grades of cotton in the disappearance and in needed working stocks are distributed the same as the disappearance for 1939-40, the last prewar year; and that the staple lengths of disappearance and working stocks are distributed the same as the disappearance for 1944. Due principally to labor shortages and unfavorable weather conditions the average grade of the crop has declined considerably during the war period, and although it is possible for mills to substitute lower grades for higher as has been done in recent years, requirements are for grades more nearly in line with those produced in 1939. With relatively large supplies of the lower grades, discounts on these qualities are very wide and there is considerable inducement for mills to shift from higher to lower grades. These wide discounts are also an incentive for farmers to use more care in harvesting so as to produce cotton Middling or at least Strict Low Middling and better. Staple lengths have averaged about the same in recent years as in prewar years.

(5) That the carry-over on August 1, 1946 will total about 8,500,000 bales as compared with 11,006,000 bales in 1945 and 10,559,000 bales in 1944. Also, that the 1946 carry-over will have a comparatively high percentage of the lower grades and shorter staples and a relatively small percentage of the higher qualities. The 1946 carry-over figures for the various grades and staple length groups were estimated by deducting the estimated disappearance for 1945-46 from the indicated supply for that season.

(6) That total requirements are the sum of the differences between the estimated 1946-47 disappearance plus working stocks minus the 1946 carry-over for each quality group. These figures are shown in detail in table 1. Requirements for quality groups are assumed to be zero when carry-over equals or exceeds disappearance plus working stocks.

American-Egyptian

The monthly rate of consumption of American-Egyptian cotton is currently decreasing with that for September 1945 amounting, on an annual basis, to about 21,000 bales. Consumption in 1944-45 and 1943-44 was about 44,000 bales annually. Stocks of American-Egyptian on August 1, 1945 were about 32,000 bales and the 1945 crop is estimated at about 4,000 running bales. In view of the present declining rate of consumption and the indicated 1945-46 supply of about 36,000 bales, requirements for 1946-47 are not sufficiently certain to justify the recommendation of a separate goal for American-Egyptian cotton.

Production capacity: The State Production Adjustment Committees suggested approximately 20 million acres of cotton for 1946. These suggestions were based on studies made before the end of the war with Japan. This is approximately 1-3/4 million acres more than were in cultivation on July 1, 1945, but is slightly less than the 20.4 million acres in 1944. A large part of the decrease from 1944 to 1945 occurred in west Texas and south-west Oklahoma, where the planting season was extremely dry, and in Missouri, Arkansas, and Louisiana, where late floods prevented farmers in the bottom-land areas from planting as much cotton as they would have under more normal conditions.

The distribution of the 1946 suggested acreage among States is about the same as the acreage distribution in 1944. The major exceptions are in western Oklahoma and in North Carolina, where acreages smaller than in 1944 were suggested, and in the Delta States, where slight increases over 1944 were suggested. In parts of some of the cotton-producing areas in Oklahoma, wheat under present conditions represents a more profitable use of land than cotton. In the cotton-tobacco areas of North Carolina tobacco can out-compete cotton for the use of labor and land. In the Delta areas an increase in cotton acreage may occur as labor shortage becomes less acute and as more mechanical cotton pickers become available.

The approximately 20 million acres suggested by the state Production Adjustment Committees for 1946 is the sum of the acreages suggested by each committee for its State. These Committees made suggestions relative to the acreage of other crops as well as cotton. In making their suggestions they had in mind a balanced use of agricultural resources which, under the assumptions used in the study, would return the highest incomes to farmers. These suggestions were made before the war with Japan had ended. They were based on the assumptions that the supply of labor would be about the same in 1946 as in 1945 and that the relative incomes from enterprises which compete with cotton for the use of land and labor would be about the same in 1946 as in 1945. Several State committees indicated that, from a production standpoint, the suggested acreage of cotton in 1946 should be increased if the labor supply appeared to be more plentiful in the spring of 1946. In light of the changes in conditions brought about by the ending of the war compared with the assumed conditions upon which the State Production Adjustment Committees based their studies, a somewhat larger acreage than the 20 million acres suggested would seem to be justified.

Suggested goal: The suggested 1946-47 goal is 20,000,000 acres which, at average yields per acre of 262 pounds, would produce approximately 10,650,000 running bales. This compares with a planted acreage of 18,355,000 in 1945 and a 1946 acreage of 20,045,000 suggested by the State Production Adjustment Committees.

So far as requirements are concerned, the production of short staple, low-grade cotton should be further reduced. In fact, little if any is needed from the 1946 crop. Cotton 15/16" to 1" is likely to be in relatively short supply in 1945-46 as indicated in table 2. To meet the requirement for these staples, farmers need to shift from varieties that ordinarily produce shorter staples to varieties producing slightly longer staples. Mills may also find it practicable to substitute some of the shorter staples for 15/16" to 1" as well as considerable quantities of the shorter lengths in the 1-1/32" to 1-3/32" group.

To achieve the grade distribution indicated by the suggested goal will require as large a proportion of the higher grades as in 1939. This will necessitate more care in harvesting than has been exercised in the war years or very favorable weather at harvest time. Even if the grades are obtained in the proportions indicated in table 2, mills will have to make some substitutions of lower grades for higher as has been done in recent years.

The fact that requirements for some qualities may not be met by the suggested acreage goal is not of sufficient importance to justify an increase in the goal above 21,000,000 acres. It is nevertheless important to strive to bring the quality of the cotton crop more nearly in line with requirements in order to improve the competitive position of cotton with synthetic fibers and foreign growths.

Labor and production supplies: Although it is expected that the farm labor supply on cotton farms during the 1946 planting and cultivating seasons will show only slight improvement over 1945, there should be sufficient labor to meet the 1946 cotton goal of 21,000,000 acres. By picking and ginning time there should be further improvement, and it is not anticipated that serious labor difficulty will be generally experienced. However, seasonal labor is always needed during the chopping and picking seasons. Producers, as well as agencies responsible for farm labor, should anticipate the needs of the areas dependent upon seasonal workers so as to have workers available when needed in order to provide seasonal labor for chopping and to avoid loss of quality cotton during the picking season.

There should be sufficient farm machinery for cotton production in 1946. The production of farm machinery and parts for use in 1946 will be larger than in any previous year. For the year ending June 20, 1946, steel and other materials made available for producing farm machinery will be at least 30 percent greater than a year earlier. The kinds of machines produced for 1946 will be determined by the manufacturers, since quota restrictions have been removed. More tillage and seeding machines will be available in 1946 than during the war years. More mechanical cotton harvesters will also be available but only enough to harvest a very small proportion of the crop.

Effective September 30, 1945, certain controls over manufacture, distribution, and use of fertilizers were revoked for 1946, however, it is estimated that the over-all supplies of nitrogen and potash will be about the same as were obtained last season. Superphosphate production is expected to show a substantial increase over previous years. There may be somewhat less imported nitrate of soda than last year for direct application to cotton, but increased supplies of ammonium nitrate and domestic nitrate of soda are anticipated. In general, supplies of mixed fertilizers and materials should be sufficient to meet the requirements of suggested acreage goals in 1946.

Marketing facilities: The stocks of cotton in public storage on July 31, 1945 were 8,373,000 bales, compared with 8,285,000 bales on the same date in 1944, 7,677,000 bales in 1943, and an all-time high of 11,620,000 bales in 1939. A carry-over of about 8,500,000 bales is expected for July 31, 1946, of which no more than 6,500,000 bales will be in public storage, the smallest July 31 stocks since 1937. More labor will be available in 1946-47 than in recent years, and cotton can be stacked higher, if necessary, than during the past few years, when the labor supply was very short. Warehouse space requisitioned by the Army and Navy during the war has caused an acute shortage of space, especially in California. It is anticipated that at least a part of this space will be available for the storage of 1946 crop cotton. The carry-over of cotton in public storage will be about 2,500,000 bales smaller on July 31, 1946 than on the same date in 1945. Total warehousing facilities will be adequate to handle a crop considerably larger than the indicated goal. However, it may be necessary, as during war years, to move some cotton from California into Gulf and Valley warehouses if the Army and Navy do not release a substantial part of the space they now control.

Railroad equipment, including boxcars suitable for hauling cotton, has been utilized at maximum capacity during the war years. The peak movement of materials in this type car appears to have been passed, and with the probability of some increase in trucks and tires no serious difficulty in moving cotton to warehouses is expected in 1946-47. However, in view of the possibility of less efficient use of cars and the probable increase in the movement of civilian goods, difficulties in moving cotton to mills and to ports may continue well into 1946.

There are ample ginning facilities to handle the 1946 crop. Supplies of bagging for cotton bale coverings will be adequate.

Recommendations for goal achievement: The farm-labor supply, wage rates, and the prices of alternative crops will be important factors that will affect the acreage planted to cotton and other crops during 1946.

Assuming that during 1946 labor on cotton farms will show some improvement and wage rates and the level of prices of competing crops will show little change from 1945, no difficulty should be experienced in reaching the 1946 cotton acreage goal. With an increase in the labor supply on cotton farms and if prices for the alternative crops are not maintained at a level sufficiently high to compete with cotton on an income basis, the 1946 cotton acreage goal is likely to be exceeded.

Since the indicated goal will provide more of the low grades and shorter staples than are needed, efforts need to be continued to encourage farmers to produce smaller proportions of these qualities.

Proposed support prices: Nonrecourse loans at 92½ percent of the parity price as of August 1, 1946 will be made available to farmers on American Upland cotton produced in 1946 and stored in warehouses approved by Commodity Credit Corporation. The basic loan rate will be for Middling 7/8 inch cotton, with appropriate premiums and discounts for other qualities and differentials according to location. The specific schedule of loan rates, with premiums and discounts, will be announced at a later date. The loans will be available until May 1, 1947, and will mature July 31, 1947, or earlier upon demand.

Nonrecourse loans at rates based on 90 percent of the parity price as of August 1, 1946, for average quality, will be made available to farmers on American-Egyptian cotton produced in 1946 and stored in warehouses approved by Commodity Credit Corporation. The loan rate will be adjusted to, and announced on, the basic quality grade (No. 2, 1½ inches, net weight), with appropriate premiums and discounts for other grades and staples, and with differentials according to location. The specific schedule of loan rates will be announced at a later date. The loans will be available until May 1, 1947, and will mature on July 31, 1947, or earlier upon demand.

Table 1 COTTON: Estimated requirements for upland cotton 1946-47

Grade and staple length	Disappearance 1/			Disappearance plus working stocks 2/		Carry-over 3/	
	Domestic	Exports	Total	1946	1946	1946	1946
	bales	bales	bales	bales	bales	bales	bales
Strict Middling & higher	1,000	1,000	1,000	1,000	1,000	1,000	1,000
29/32" & shorter	167	69	236	330	88	242	
15/16" - 1"	613	252	865	1,211	127	1,084	
1-1/32" - 1-3/32"	708	291	999	1,399	434	965	
1-1/8" & longer	185	77	262	367	78	289	
Total	1,673	689	2,362	3,307	727	2,580	
Middling							
29/32" & shorter	465	192	657	920	818	102	
15/16" - 1"	1,499	617	2,116	2,962	480	2,482	
1-1/32" - 1-3/32"	1,364	562	1,926	2,696	943	1,753	
1-1/8" & longer	117	48	165	231	209	22	
Total	3,445	1,419	4,864	6,809	2,450	4,359	
Strict Low Middling							
29/32" & shorter	406	167	573	802	1,248	0	
15/16" - 1"	1,106	456	1,562	2,187	590	1,597	
1-1/32" - 1-3/32"	983	405	1,388	1,943	686	1,257	
1-1/8" & longer	72	29	101	142	120	22	
Total	2,567	1,057	3,624	5,074	2,644	2,876	
Low Middling & lower							
29/32" & shorter	217	89	306	428	968	0	
15/16" - 1"	344	142	486	680	1,220	0	
1-1/32" - 1-3/32"	242	100	342	479	502	0	
1-1/8" & longer	12	4	16	23	24	0	
Total	815	335	1,150	1,610	2,714	0	
All grades							
29/32" & shorter	1,255	517	1,772	2,480	3,122	344*	
15/16" - 1"	3,562	1,467	5,029	7,040	2,417	5,163*	
1-1/32" - 1-3/32"	3,297	1,358	4,655	6,517	2,565	3,975*	
1-1/8" & longer	386	158	544	763	431	333*	
Total	8,500	3,500	12,000	16,800	8,535	9,815*	

1/ Computed on basis of 1939 grade and 1944 staple distributions.

2/ Working stocks or "normal" carry-over computed as 40 percent of disappearance. Working stocks are the quantity of cotton needed to keep consumption and exports going until the new crop becomes available.

3/ Disappearance plus working stock minus estimated carry-over as of July 31, 1946. When the carry-over is the larger of the two, differences are shown as zero, *Sum of bales in each staple length and grade groups.

Table 2 COTTON: Estimated requirements and 1946-47 suggested goal production by qualities

Grade and staple length	Requirements <u>1/</u>	Suggested Goal <u>2/</u>
	1,000 bales	1,000 bales
Strict Middling & higher		
29/32" & shorter	242	110
15/16" - 1"	1,084	506
1-1/32" - 1-3/32"	965	1,253
1-1/8" & longer	289	129
Total	2,580	1,998
Middling		
29/32" & shorter	102	404
15/16" - 1"	2,482	1,656
1-1/32" - 1-3/32"	1,753	2,043
1-1/8" & longer	22	160
Total	4,359	4,263
Strict Low Middling		
29/32" & shorter	0	400
15/16" - 1"	1,597	1,513
1-1/32" - 1-3/32"	1,257	1,571
1-1/8" & longer	22	98
Total	2,876	3,582
Low Middling & lower		
29/32" & shorter	0	160
15/16" - 1"	0	388
1-1/32" - 1-3/32"	0	250
1-1/8" & longer	0	9
Total	0	807
All grades		
29/32" & shorter	344	1,074
15/16" - 1"	5,163	4,063
1-1/32" - 1-3/32"	3,975	5,117
1-1/8" & longer	333	396
Total	9,815	10,650

1/ Estimated as indicated by detailed figures in table 1. 2/ Computed on basis of (1) 1946 acreage goal of 20,000,000 acres; (2) average yields per acre of about 262 pounds; (3) grade production pattern for 1939; (4) staple length distribution of 1944; and (5) some adjustments for shifts in areas of production. Although this production goal does not fully meet requirements, particularly in the higher grades of the 15/16" to 1" staple length group it calls for considerably more of the higher grades than were produced during the war years and it is believed that necessary substitutions can be made without seriously hampering domestic mill output or foreign trade in cotton.

COTTON: Suggested State Goals for 1946

State and Region	Suggested 1946 Goal		Acreage		% Acreage Goal is of	
	Production	Acres	Indicated	1937-41	Indicated	1937-41
	1,000	1,000	1,000	1,000	Percent	Percent
Ill.	3	4	4	5	100	80
Mo.	400	400	270	429	148	93
N. C.	403	404	274	434	147	93
Va.	18	27	27	42	100	64
N. C.	540	740	595	880	124	84
Ky.	15	15	13	13	125	83
Tenn.	480	690	605	767	114	90
E. C.	1,053	1,472	1,240	1,707	119	86
Ala.	790	1,425	1,380	2,142	103	67
Ark.	1,300	1,850	1,630	2,283	113	81
Fla.	9	25	25	81	100	31
Ga.	730	1,420	1,250	2,115	114	67
La.	550	1,000	860	1,228	116	81
Miss.	1,760	2,500	2,310	2,770	108	90
Okla.	425	1,250	1,375	1,938	91	64
S. C.	750	1,125	1,020	1,344	110	84
Tex.	2,310	7,000	6,400	2,560	109	73
South.	8,624	17,595	16,250	23,461	108	76
Ariz.	150	140	153	233	92	60
Calif.	320	265	319	405	83	65
Kans.	2/	1/	1/	1/	-	-
N. Mex.	120	124	119	117	104	106
West.	570	550	521	755	90	70
U. S.	10,650	20,000	18,355	26,357	109	76

1/ Less than 1,000 acres.

2/ Less than 500 bales.

Suggested
Production Goals
1946

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BROOMCORN

Requirements: The broomcorn situation for both 1944-45 and 1945-46 changed materially subsequent to recommendations of the goals committee regarding 1945 production. The most significant changes having substantial effect upon the planning of 1946 goals are as follows:

- (1) The 1944 production of 67,200 tons exceeded the October 1, 1944 crop estimate by 4,600 tons. Imports during the 1944-45 crop year are currently estimated as 2,760 tons, 960 tons greater than the prior estimate. These changes in supplies result in increasing the estimated carry-over on July 31, 1945 from 11,650 tons to 17,510 tons.
- (2) Data on imports for the years 1943-44 and 1944-45 show in excess of 2,500 tons each year. Therefore, whereas it was estimated a year ago that no broomcorn would be imported during 1945-46, it now appears reasonable that approximately 2,500 tons may be received from Mexico and Argentina.
- (3) The requirements for 1945-46 are estimated now as 42,500 tons, a decrease of 11,000 tons due to termination of hostilities on both fronts, with substantial decreases in military and industrial demands for brooms and some decrease in civilian consumption anticipated.
- (4) While the 1945 goals committee did not recommend production in 1945 to be great enough to provide the full stated requirements of 53,500 tons (or 51,850 tons estimated net requirement with a 10,000-ton carry-over allowed), it now seems probable that the suggested 1945 goal of 43,397 tons was about 10,000 tons greater than required under the changed conditions described above. The October 1, 1945 crop estimate of 32,600 tons indicates that the 1945 crop will provide ample broomcorn for 1945-46 requirements and will permit a July 31, 1946 carry-over of 10,110 tons.

The 1946-47 broomcorn requirements for civilian, military, and industrial consumption are estimated as 40,000 tons. This is approximately the 10-year prewar average requirement. It is further estimated that imports and exports will be about equal, approximately 2,500 tons each.

The probable disposition of broomcorn supplies for the crop years 1944-45 and 1945-46 and supplies and requirements estimated for 1946-47, with provision for a 10,000-ton carry-over as of July 31, 1947, are shown in the following table.

	<u>1944-45</u>	<u>1945-46</u>	<u>1946-47</u>
	In short tons		
<u>Supplies</u>			
Carry-in (July 31)	750 1/	17,510	10,110
Imports	2,760 2/	2,500 3/	2,500 3/
Production	67,200	32,600 4/	39,890 7/
Total	70,710	52,610	52,500
<u>Requirements</u>			
Civilian	40,000	(40,000 5/	40,000 5/
Military and Industrial	10,000		
Exports	3,200 2/	2,500 6/	2,500 6/
Total	53,200	42,500	42,500
Carry-over (July 31)	17,510	10,110	10,000

1/ WPB estimate 500-1,000.

2/ Compiled in OFAR.

3/ Estimated as slightly less than 1943-44 and 1944-45.

- 4/ October 1, 1945 Crop Estimate. November 1 estimate was 30,900 tons. Any reduction from the October 1 estimate will reduce the carry-in for 1946-47 and unless offset by increased 1946 production above that estimated the July 31, 1947 carry-over will be below the normal 10,000 tons.
- 5/ Production requirement estimated for 1945-46 by WPB (June 29, 1945) adjusted to consumption basis by adding 5,000 tons to bring the total requirement up to the prewar average.
- 6/ Estimated at approximately the average of past five years.
- 7/ 1946 production needed to meet estimated requirements, including 10,000-ton carry-over.

Production Capacity: Because broomcorn brush can be used for only one purpose--for making brooms and brushes--the crop can be easily overproduced. A large crop in one year of normal requirements may result in breaking the price the following year. Unlike many other farm commodities the production capacity in 1946 will probably be so adequate as to greatly exceed domestic requirements. Broomcorn growers base their acreage plans on price levels for their crop in competition with other crops and on the availability of harvesting labor.

Suggested Goal: The suggested acreage goal for broomcorn in 1946 is 328,000 planted acres. Based upon average abandonment of 9 percent during the years 1940-45, this should result in approximately 298,000 harvested acres. Assuming a national average yield per harvested acre of 268 pounds, the total production will reach approximately 40,000 tons. This should provide the full requirements for 1946-47.

It is proposed that the 1946 acreage be divided among the various States as given in the following table showing the suggested planted acreage for 1946 with comparisons of the acreage in previous years:

BROOMCORN: Suggested State Goals for 1946

State	:Suggested 1946 Goal:		Acreage		: % Acreage Goal is of	
	:Production :	: Acres :	1945	: 1937-41 :	1945	: 1937-41
	: (tons) :	: Indicated:			: Indicated :	
	1,000	1,000	1,000	Percent	Percent	
Illinois	4,400	16	7	33	229	48
Oklahoma	12,600	99	72	92	138	108
Texas	4,900	35	36	28	97	125
Kansas	2,900	30	13	34	231	87
Colorado	7,700	78	90	75	87	104
New Mexico	7,500	70	53	65	132	108
U. S.	40,000	328	271	326	121	101

In determining suggested State goals consideration has been given to desirable relationship between standard and dwarf varieties. The 5-year average 1937-41 production ratio was approximately 64 percent standard and 36 percent dwarf. In 1944, the ratio was 52-48 percent and in 1945, the indicated production will result in a ratio of 65-35 percent. The suggested 1946 goals will provide 61 percent standard and 39 percent dwarf. It is believed that this relationship should supply the industry with an adequate quantity of each variety.

The percentages that the 1946 suggested State goals are of the 1945 indicated acreages appear erratic. Because of drouth and uncertainties regarding labor, the acreage planted in 1945 cannot be considered as the normal relationship between States. In determination of appropriate State goals for 1946, consideration also has been given to the 10-year (1933-43) average planted acreage and to State trends in acreage during that period.

Labor and Production Supplies: Although there will be no POW labor available for 1946 harvest and some reduction is anticipated in imported labor from Mexico and other sources, there should be only minor difficulty in harvesting the suggested goal acreage. Farm machinery and equipment incident to broomcorn production should be adequate for 1946.

Marketing Facilities: The broom industry can handle considerably greater production than is suggested for 1946. Warehouse space and farm storage are adequate to handle the crop during the period of peak movement. Transportation has never been a great broomcorn problem and should be better in 1946.

Proposed Price Support: There has been no price support program for broomcorn and none is contemplated for 1946.

Suggested
Production Goals:
1946

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SUGAR

In establishing minimum 1946 national sugar beet and sugarcane goals, primary consideration was given to the sugar requirement and supply situation for the year beginning October 1, 1946. An estimated requirement of 7,500,000 tons of sugar for U. S. civilians during that period is based on probable income and expenditure levels and population. This amount would provide for a consumption of about 100 pounds per capita. This compares to a prewar average of about 97 pounds. The requirements of U. S. military forces are currently estimated at 275,000 tons. These items, together with an estimated 50,000 tons for export, equal a total requirement of 7,825,000 tons. An estimate of supplies available to the U. S. to meet this requirement shows the need for maximum production of Mainland sugarcane and beet crops. Therefore, minimum national goals of 1,025,000 acres of sugar beets and 327,000 acres of Mainland sugarcane have been established.

Available information indicates that the European beet sugar production in 1945 will be sharply lower than the peacetime levels. The French production, which in peacetime exceeded 1,000,000 tons, is expected to be about 350,000 tons. The Netherlands, because of flooding of certain land, is expected to produce not more than about one-third of a normal crop. Prospects in Czechoslovakia, Poland, Germany, Austria, Hungary, and Italy indicate exceedingly small harvests. Russian production is expected to be somewhat expanded from the very low levels of the war period.

Many factors, including destruction and loss of transportation facilities, motive power, draft animals, fertilizers, farm labor, processing facilities, and scarcity of fuels, retarded beet sugar production in Europe for a number of years after World War I. Similar forces may be operative for a number of years following World War II. Should European production continue at low levels in 1946, the requirements of Europe from the cane sugar producing areas of the world may be significantly larger than during the prewar period.

It will be recalled, however, that the wave of nationalism which swept through the world following World War I led to the establishment of tariff, bounty, and quota structures which expanded beet sugar production and in conjunction with the enlarged cane sugar industry of the tropics, created a major problem of adjustment. The programs of the European nations for beet sugar production in 1946 will have a significant bearing upon the quantities of sugar required from the tropical producing sources. Furthermore, the ability of Europe to draw upon the world sources of sugar supply will depend in part upon the amount of exchange available to those nations.

In view of war destruction and continuing unsettled conditions, it is expected that the redevelopment of the crop in Java, Formosa, and in the Philippines, may be a slow process. While there may be some sugar available for the U. S. in 1946 from present stocks in Java it is not expected materially to affect our supply after October 1, 1946. In the case of the Philippine Islands, planters may defer operations until such time as there is legislative certainty with regard to the U. S. market. The passage of the Reciprocal Trade Agreement legislation with the possible lower duties may have removed this problem partly. It is not believed that any significant quantities will be available in late 1946, and prospects for 1947 may depend upon the kind of legislation relative to the Philippines that Congress may enact. In developing these goals it is assumed that only nominal quantities will be available in 1947 from Java and the Philippines.

For the purpose of estimating supplies it is assumed that about 5,000,000 tons will be produced in Cuba in 1947, of which probably about 2,750,000 tons will be available to the U. S. The 1944 production, including the sugar equivalent used for invert molasses, amounted to 5,650,000 tons. Due in part to the worst drought in 86 years, the 1945 production was reduced to 3,925,000 tons. Notwithstanding the after-effects of the drought, production may again reach the 5,000,000-ton level in 1946.

<u>Estimated Requirements and Supplies</u> (Oct. 1, 1946 - Sept. 30, 1947)		<u>Thousand Short Tons</u> (Raw Value)
Estimated U. S. Requirements		
Civilian		7,500
Military		275
Exports		50
Total		7,825
Estimated Supplies		
Cuba--new production beginning Jan. 1947	5,000	
Est. requirements of areas other than U.S.	2,250	
Est. amount available to U.S.		2,750
Puerto Rico--new production beginning Feb. 1947		1,150
Hawaii--Calendar year 1947		950
Java-Philippines--new production beginning Nov. 1946		100
Total estimated supplies from offshore areas		4,950
Additional requirements		2,875

In view of these requirements for sugar, minimum goals of 1,025,000 acres of sugar beets (equivalent to 1,900,000 tons of sugar) and 327,000 acres of sugarcane (equivalent to 550,000 tons of sugar) have been established. Without provision for rebuilding depleted stocks and assuming the above supplies from various areas, there still remains a deficit of 425,000 tons.

Sugar Beets: A minimum goal of 1,025,000 acres of sugar beets for 1946 compares with a record planting in 1942 of 1,048,000 acres and is 31 percent greater than the 1945 acreage.

There are a number of factors which will aid in obtaining increased sugar beet acreage in 1946. The level of support prices announced for sugar beets from the 1946 crop is \$1 per ton higher than the 1945 price. Less competition from other crops is expected because of price changes. Mechanical equipment is being used more widely in sugar beet production. There are indications that farmers desire to adopt crop rotations, including increased acreages of sugar beets.

Because of the uncertainty regarding the availability of sufficient labor for sugar beet work under a status of war demobilization and reconversion, an aggressive farm-labor supply program is planned by the Department and a liberal appropriation to support such a program has been recommended to the Congress.

The minimum national goal has been tentatively divided between States as shown in the accompanying table. Because local problems may make it extremely difficult to attain these goals in certain States, the goals for other States should be revised upward wherever prospects are favorable.

SUGAR B ETS: Suggested State Goals for 1946

State and Region	Suggested 1946 Goal:		Acreage		% Acreage Goal is of	
	Production:		1945		1945	
	(tons)	Acres	Indicated	1937-41	Indicated	1937-41
	1,000	1,000	1,000	1,000	Percent	Percent
North Central						
Ill.	31.8	3	2	2.8	150	107
Ind.	--	--	--	9.2	--	--
Iowa	66.5	7	2	5.3	350	132
Michigan	1,148.0	140	92	112.0	152	125
Minn.	357.2	38	34	34.3	112	111
Nebr.	1,100.3	86	63	73.0	137	118
Ohio	304.0	40	23	44.0	173	91
S. Dakota	95.0	10	7	8.6	143	116
Wis.	196.0	20	17	16.5	118	121
Western						
Calif.	2,170.0	155	102	164.0	152	94.5
Colo.	2,500.0	200	163	153.0	123	131
Idaho	1,123.4	82	59	69.0	139	119
Kans.	89.0	10	6	9.4	167	106
Mont.	1,073.6	83	88	77.0	100	114
N. Dakota	137.0	17	17	13.2	100	129
Oreg.	227.3	17	17	7.6	100	224
Utah	558.0	45	36	51.0	125	88
Wash.	253.3	17	13	13.4	131	127
Wyo.	610.0	50	38	50.0	132	100
U. S.	12,091.4	1,025	779	913.5	132	112.2

Sugarcane: A minimum goal of 327,000 acres of sugarcane has been established. This acreage, with normal yields, will provide sufficient cane for seed and for sugar production to the capacity of the processing facilities. The goal is an 8 percent increase over the 1945 acreage. A proportionately higher increase is indicated for Florida because additional processing facilities will be available.

The price support payment on the 1946 crop has been advanced to \$2.10 per ton of cane from \$1.60 per ton for the previous crop. The labor problems for this crop are expected to be handled under the Department's farm-labor supply program.

SUGARCANE (for sugar and seed): Suggested State Goals for 1946

State	Suggested 1946 Goal:		Acreage		% Acreage Goal is of	
	Production:		1945		1945	
	(tons)	Acres	Indicated	1932-41	Indicated	1932-41
Louisiana	5,330	288	271	229.8	106	125
Florida	1,236	39	31.7	19.5	123	200
U. S.	6,566	327	302.7	249.3	108	131

Proposed Price Support: The Department of Agriculture will offer to enter into price supporting agreements with sugar beet processors under which the Department, through the processors, will assure farmers a national average return for 1946-crop sugar beets of standard quality \$4 per ton higher than the average return for 1942-crop sugar beets of standard quality. (Sugar beets of standard quality contain 16.5 percent sucrose if tested as bought or 16.2 percent sucrose if tested as sliced.) This price support will be applicable to sugar beets delivered to the processors at the usual delivery points. It is estimated that total returns to growers from the 1946 crop, including payments under the Sugar Act of 1937, will average around \$13.50 per ton for sugar beets of the average quality of recent years.

Under the Price support program for the 1946 crop of Louisiana and Florida sugarcane, the Department of Agriculture will enter into agreements with sugarcane processors under which price support payments (which will be in addition to payments under the Sugar Act of 1937) will be made to farmers through the processors. The rates of these payments, subject to downward adjustment in the event of an advance in the market price of sugar, are: For Louisiana, about \$2.10 per ton of sugarcane of the average quality of recent years (\$2.04 per ton of "standard" cane); for Florida, \$2.10 per ton of average sugarcane, the payment to be graduated upward or downward on the basis of the quantity of sugar commercially recoverable from the cane.

Suggested
Production Goals
1946

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IRISH POTATOES

Summary: It is recommended that the 1946 acreage goal for Irish potatoes be fixed at 2,780,000 acres, sufficient under average growing conditions to produce approximately 378 million bushels. For 1945, acreage and production goals of 3,137,400 acres and 408 million bushels were recommended by the Department. Actual plantings were 2,917,000 acres, but production soared to 431 million bushels when yields averaged 148 bushels per planted acre, as against 130 bushels per acre taken for goal purposes. An average yield of 136 bushels per acre has been assumed for the 1946 crop. The production goal for 1946 is slightly larger than the average crop of the 10 years ended 1944, which was 372 million bushels. The recommended acreage goal, however, is substantially below the approximate 3,050,000-acre average of plantings during the same period, reflecting the pronounced shift toward concentration of production in high-yielding areas.

Requirements: The production goal of 378 million bushels was determined by the sum total of anticipated requirements for 1946. The guiding consideration in this connection was the establishment of a goal which would adequately supply all consumption and utilization needs without creating another surplus situation with its attendant price support burden on the Government.

The various components which go to make up this estimated total requirement of 378 million bushels are shown in the analysis of production needs on the continuation sheet to the tables attached hereto. Civilian demand for potatoes in fresh form aggregating 287 million bushels constitute the largest single item. The quantity estimated as needed for this purpose is based upon an expected average per-capita consumption of 123 pounds. This compares with civilian per-capita consumption averaging 126 pounds from the normal 1944 crop, 133 pounds from the record 1943 crop, and 118 pounds out of the small production of 1942. In view of the downward trend in the consumption of potatoes, and the fact that 3-5 million men will still be absent from the civilian population on military duty, the per-capita consumption figure of 123 pounds assumed for goal purposes in 1946 appears adequate.

Suggested goal: The suggested 1946 Irish potato acreage goal was derived by determining the percentage relationship between probable total production on a given acreage base and the national production goal. Average plantings of the individual States during the period 1941-45, weighted 10 percent to each of the first three years and 35 percent to each of the last two years, were taken as the acreage base. The purpose of selecting this base was to give effect to recent trend and thereby tend to minimize the adjustment required from the actual acreage levels of the last two years. An assumed yield per acre for each State in 1946 was applied to the respective 1941-45 weighted average acreage to determine its probable production on this acreage base. The yield factors used were projections of trends established by the 100 percent equivalent yields of the last 10 years, multiplied by average condition during that period. For the U. S. as a whole, it was found that this resulted in a probable total production of 404 million bushels.

Since the 1946 production goal is 378 million bushels, it was necessary to reduce the acreage base in accordance with the ratio between probable production and the production goal. The acreage base of each State was thereupon uniformly reduced to 93.5 percent of its 1941-45 weighted average plantings to apportion the 1946 goal equally among the States.

Other considerations: In determining that a production of 378 million bushels of potatoes in 1946 would amply supply all requirements and at the same time be readily marketed at or above support levels, it was assumed that (1) Current high level of consumer purchasing power will be generally maintained; and (2) surplus stocks carried over from the 1945 crop will not be allowed to compete with new production.

Total national income is expected to be lower during the 12 months beginning April 1946 than it was at the wartime peak, but still far above the prewar levels. It was considered that 130-135 billion dollars is a reasonable estimate and the amount to be assumed for working purposes. Realization of this income would apparently insure the consumption of the national goal production of 378 million bushels at slightly more than support levels, assuming normal seasonal distribution, if the prewar supply-price relationship is still valid.

It is expected that merchantable stocks of Irish potatoes in the hands of growers and dealers as of January 1, 1946 may be as high as 125 million bushels after allowance for surplus removal to that date. This compares with an estimated total of 103.5 million bushels on January 1, 1945 (approximately normal stocks) and 134 million bushels on January 1, 1944, carried over from the record crop of 1943. If allowed to be marketed through ordinary commercial channels, the heavy supply of late 1945 potatoes would seriously depress prices of early 1946 potatoes and probably require large-scale purchases by the Government. It is assumed, therefore, that any excess of late potatoes held over into 1946 will be reduced by Government programs of export and diversion.

Marketing Facilities: With a recommended level of production substantially below that of 1943 and 1945, packing, grading, transportation, and storage conditions, which normally have some bearing upon the optimum size of a crop, will not operate as limiting factors in 1946.

With no governmental requirements for dehydrated potatoes, and only a negligible demand for canned potatoes, there will be practically no need for processing potatoes in these forms in 1946.

Wartime additions to plants and equipment for packing and grading potatoes, availability of improved equipment, and experience gained in handling the record 1943 and the bumper 1945 crops are expected to make the handling of a 1946 crop of the size suggested comparatively easy.

Although the number of refrigerator cars in service continued to decline in 1945, transportation facilities in 1946 are expected to be adequate to move an average-sized crop of potatoes. More locomotives, refrigerator cars, and men will be available for the efficient handling of peacetime rail freight. Trucks, gasoline, and tires available for non-military use will allow motor-truck transportation again to carry an important part of the load. Release of coastwise ships by the Government will permit a return to water transportation from feasible areas.

Storage space for potatoes will not be a serious problem in 1946-47 except possibly in local areas where yields may be greatly in excess of expectations.

Recommendations for Goal Achievement: For the first time in several years the principal problem in potato goal achievement again involves balancing production with peacetime demand rather than expanding production to the limit of capacity. In the absence of a direct acreage control program operative upon individual growers and implemented with appropriate sanctions, no assurance can be had that the necessary reductions from the level of last year's plantings can be effected. The voluntary cooperation of all producers must be secured.

Proposed Price Support: Prices to farmers for potatoes produced in 1946 will be supported at 90 percent of parity. Differentials may be provided for season, location, type, variety, or class of potatoes.

IRISH POTATOES: Planted Acreage

Table 1

Crop and State	1946 : Suggested :	1945 : Indicated :	1944	1943	1942	1941	1941-45	1937-41
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
<u>Surplus Late</u>								
Maine	184	211	201	212	158	151	187	156
N. Y.	180	187	195	213	193	187	195	204
Pa.	154	157	167	179	167	167	167	179
Mich.	169	174	174	220	180	190	188	228
Wis.	137	131	144	190	158	158	156	190
Minn.	192	175	214	261	202	225	215	238
N. Dak.	166	191	180	182	147	155	171	143
S. Dak.	34	35	36	49	33	31	37	30
Neb.	69	66	75	95	76	76	78	83
Mont.	20	22	22	24	16	15	20	17
Idaho	161	198	165	197	136	124	164	130
Wyo.	14	15	15	18	15	16	16	19
Colo.	86	102	93	90	76	70	86	86
Utah	17	19	18	20	13	11	16	13
Nev.	3	4	3	3	2	2	3	2
Wash.	48	58	48	61	40	42	50	41
Oreg.	46	55	47	58	35	35	46	36
Calif.	94	117	103	90	69	71	90	69
Total 18	1,774	1,917	1,900	2,162	1,716	1,726	1,885	1,864
<u>Other Late</u>								
N. H.	6	7	8	9	7	7	8	7
Vt.	11	12	12	15	12	12	13	13
Mass.	22	24	24	25	19	18	22	16
R. I.	6	7	7	6	5	5	6	4
Conn.	20	22	21	22	16	15	19	15
W. Va.	31	31	34	37	34	32	34	32
Ohio	71	65	73	95	90	87	82	100
Ind.	36	34	36	47	49	50	43	51
Ill.	30	29	32	36	36	36	34	38
Iowa	41	38	42	54	55	54	49	58
N. Mex.	5	5	5	6	4	4	5	4
Ariz.	5	7	6	7	3	2	5	1
Total 12	284	281	300	359	330	322	320	339
<u>Intermediate</u>								
N. J.	64	72	71	71	56	55	65	54
Del.	4	4	4	4	4	4	4	4
Md.	19	19	21	22	20	20	20	23
Va.	68	70	73	79	72	76	74	78
Ky.	42	43	43	53	48	44	46	42
Mo.	36	35	37	46	40	39	39	43
Kans.	24	24	27	34	28	24	27	27
Total 7	257	267	276	309	268	262	275	271
<u>Early</u>								
N. C.	77	72	86	110	89	80	87	82
S. C.	24	21	29	31	28	26	27	24
Ga.	27	27	30	35	27	25	29	23
Fla.	31	36	34	33	28	31	32	33
Tenn.	41	41	44	61	44	42	46	41
Ala.	52	50	61	56	54	54	55	49
Miss.	28	27	34	34	27	23	29	22
Ark.	43	39	49	61	47	42	48	40
La.	52	51	68	63	42	43	53	42
Okla.	29	25	32	49	34	31	34	30
Tex.	61	63	67	76	56	62	65	53
Total 11	465	452	534	609	476	459	505	439
U. S.	2,780	2,917	3,010	3,439	2,790	2,769	2,985	2,913

(Footnotes, page 7)

IRISH POTATOES: Yield per Planted Acre

Table 2

Crop and State	1946 Assumed $\frac{2}{3}$	1945 Indicated $\frac{3}{4}$	1944	1943	1942	1941	1941-45
- bushels per acre -							
<u>Surplus Late</u>							
Me.	280	275	268	343	270	285	288
N.Y.	145	161	136	139	143	148	145
Pa.	120	114	115	104	105	128	113
Mich.	103	112	106	102	92	105	103
Wisc.	85	104	82	86	64	91	85
Minn.	84	100	72	90	89	71	84
N.D.	107	120	116	121	122	97	115
S.D.	65	83	71	75	85	56	74
Neb.	125	170	112	127	169	127	141
Mont.	106	115	115	110	108	103	110
Idaho	220	220	222	221	225	221	222
Wyo.	130	163	145	128	149	141	145
Colo.	190	189	202	206	224	179	200
Utah	165	174	154	170	183	170	170
Nev.	185	180	160	260	210	240	198
Wash.	210	211	215	216	195	210	209
Ore.	210	211	220	200	195	205	206
Calif.	325	340	323	310	335	275	317
Average of 18	158	165	148	156	146	143	152
<u>Other Late</u>							
N.H.	155	155	140	157	160	155	153
Vt.	131	125	138	122	127	145	131
Mass.	140	134	130	135	155	140	139
R.I.	190	190	190	175	195	200	190
Conn.	170	175	160	145	185	180	169
W.Va.	88	92	60	75	112	112	90
Ohio	102	116	80	90	102	122	102
Ind.	112	136	87	87	132	115	111
Ill.	85	101	56	60	98	90	81
Iowa	95	114	59	97	120	102	98
N.Mex.	75	75	35	80	85	72	79
Ariz.	200	198	213	167	208	130	183
Average of 12	112	125	92	99	121	119	111
<u>Intermediate</u>							
N.J.	172	180	124	161	181	188	167
Dela.	88	113	62	70	86	77	82
Md.	100	115	89	88	103	96	98
Va.	115	124	82	121	101	90	104
Ky.	30	99	58	88	95	70	82
Mo.	92	85	60	82	104	120	90
Kansas	75	66	42	80	96	105	78
Average of 7	115	124	82	111	117	113	109
<u>Early</u>							
N.C.	100	117	81	110	106	83	99
S.C.	100	123	50	103	111	98	97
Ga.	57	76	45	62	66	52	60
Fla..	130	144	102	114	147	109	123
Tenn.	70	85	56	72	81	62	71
Ala.	90	106	55	94	74	104	87
Miss.	65	68	65	56	71	60	64
Ark.	72	61	65	74	77	72	70
La.	58	59	51	62	60	61	59
Okla.	55	46	63	51	66	64	58
Tex.	75	80	75	84	83	97	84
Average of 11	80	122	97	101	104	95	104
U.S.	136	149	126	135	133	129	134

(Footnotes, page 7)

IRISH POTATOES: Method of Determination of Goals

Table 3

Crop and State		1941-45 : Weighted : Average	Assumed : Yields : per acre	Production : Potential : on base	1946 : Acreages : Needed	Production : Goals 7/ : Goals 6/
		4/: Acreages	2/: in 1946	5/: Acreages	for Goals	7/ Goals
		1,000 acres	bushels	1,000 bus.	1,000 acres	1,000 bus.
Surplus Late						
Me.	197	280	55,160	184	51,520	
N. Y.	193	145	27,985	180	26,100	
Pa.	165	120	19,800	154	18,480	
Mich.	181	103	18,643	169	17,407	
Wisc.	147	85	12,495	137	11,645	
Minn.	205	84	17,220	192	18,128	
N. Dak.	178	107	19,046	166	17,762	
S. Dak.	36	65	2,340	34	2,210	
Nebr.	74	125	9,250	69	8,625	
Mont.	21	106	2,226	20	2,120	
Idaho	173	220	38,060	161	35,420	
Wyo.	15	130	1,950	14	1,820	
Colo.	92	190	17,480	86	16,340	
Utah	18	165	2,970	17	2,805	
Nev.	3	185	555	3	555	
Wash.	51	210	10,710	48	10,080	
Oreg.	49	210	10,290	46	9,660	
Calif.	101	325	32,825	94	30,550	
Total 18	1,899	158	299,005	1,774	279,227	
Other Late						
N. H.	7	155	1,085	6	930	
Vt.	12	131	1,572	11	1,441	
Mass.	23	140	3,220	22	3,080	
R. I.	6	190	1,140	6	1,140	
Conn.	21	170	3,570	20	3,400	
W. Va.	33	88	2,904	31	2,728	
Ohio	76	102	7,752	71	7,242	
Ind.	39	112	4,368	36	4,032	
Ill.	32	85	2,720	30	2,550	
Iowa	44	95	4,180	41	3,895	
N. Mex.	5	75	375	5	375	
Ariz.	5	200	1,000	5	1,000	
Total 12	303	112	33,886	284	31,813	
Intermediate						
N. J.	68	172	11,696	64	11,008	
Del.	4	88	352	4	352	
Md.	20	100	2,000	19	1,900	
Va.	73	115	8,395	68	7,820	
Ky.	45	80	3,600	42	3,360	
Mo.	38	92	3,496	36	3,312	
Kans.	26	75	1,950	24	1,800	
Total 7	274	115	31,489	257	29,552	
Early						
N. C.	83	100	8,300	77	7,700	
S. C.	26	100	2,600	24	2,400	
Ga.	29	57	1,653	27	1,539	
Fla.	33	130	4,290	31	4,030	
Tenn.	44	70	3,080	41	2,870	
Ala.	55	90	4,950	52	4,680	
Miss.	30	65	1,950	28	1,820	
Ark.	46	72	3,312	43	3,096	
La.	56	58	3,248	52	3,016	
Okla.	31	55	1,705	29	1,595	
Tex.	65	75	4,875	61	4,575	
Total 11	498	80	39,963	465	37,321	
U. S.	2,974	136	404,343	2,780	377,913	

(Footnotes, page 7)

IRISH POTATOES: Suggested 1946 Acreage with Comparisons.

Table 4

Crop and State	Goal Acreages			% 1946 Acreage Goal is of	
	Suggested 1946	1945	1944	1945 Goal	1945 Plantings
	1,000	1,000	1,000	Percent	Percent
Surplus Late					
Me.	134	200	200	92.0	57.2
N. Y.	130	204	219	88.2	96.3
Pa.	154	179	200	86.0	98.1
Mich.	169	220	245	76.3	97.1
Wis.	137	150	205	91.3	104.6
Minn.	192	233	261	80.7	109.7
N. D.	166	187	200	83.3	36.9
S. D.	34	40	51	85.0	57.1
Nebr.	69	30	100	66.2	104.5
Mont.	20	17	22	117.6	90.9
Idaho	161	169	130	95.5	81.3
Wyo.	14	16	17	87.5	93.3
Colo.	86	90	90	95.0	34.3
Utah	17	18	20	94.4	39.5
Nev.	3	3.4	4	88.2	75.0
Wash.	46	50	51	96.0	32.3
Oreg.	46	46	50	100.0	33.6
Calif.	94	95	90	98.9	30.3
Total 18	1,774	2,002.4	2,205	88.6	92.5
Other Late					
N. H.	6	3.5	10	70.6	85.7
Vt.	11	14	16	73.6	91.7
Mass.	22	25	26	88.0	91.7
R. I.	6	7	6.5	85.7	35.7
Conn.	20	21	23	95.2	90.9
W. Va.	31	35	42	88.6	100.0
Ohio	71	90	100	78.9	109.2
Ind.	36	51	52	70.6	105.9
Ill.	30	33	38	90.9	103.4
Iowa	41	55	57	74.5	107.9
N. M.	5	5	4.6	100.0	100.0
Ariz.	5	7	7	71.4	71.4
Total 12	234	351.5	332.3	80.8	101.0
Intermediate					
N. J.	64	66	70	97.0	33.9
Del.	4	4	4	100.0	100.0
Md.	19	20	23	95.0	100.0
Va.	63	75	75	80.7	97.1
Ky.	42	46	54.2	91.3	97.7
Mo.	36	33	42	94.7	102.9
Kans.	24	27	33	86.9	100.0
Total 7	257	276	301.2	93.1	96.3
Early					
N. C.	77	87	95	88.5	106.9
S. C.	24	30	40	80.0	114.3
Ga.	27	27	35	100.0	100.0
Fla.	31	33.5	35	92.5	36.1
Tenn.	41	44	57	93.2	100.0
Ala.	52	55	59	94.5	104.0
Miss.	28	34	36	82.4	103.7
Ark.	43	50	55	86.0	110.3
La.	52	50	60	104.0	102.0
Okla.	29	32	45	90.6	116.0
Tex.	61	65	75	93.0	96.3
Total 11	465	507.5	592	91.6	102.9
U. S.	2,700	3,137.4	3,400.5	86.6	95.5

Footnotes:

- 1/ As of July 1, 1945.
- 2/ Furnished by the Division of Agricultural Statistics, Bureau of Agricultural Economics. Based upon recent trend as evidenced by a projection of 100 percent equivalent yield per acre for the respective States, assuming average growing conditions in 1946.
- 3/ As of October 1, 1945.
- 4/ Weighted 10 percent to each of the 3 years 1941-43 and 35 percent to each of the 2 years 1944 and 1945.
- 5/ Representing the production potential on the weighted average acreage base defined in footnote 4.
- 6/ Base acreages of the respective States (1941-45 averages, weighted as defined in footnote 4) reduced uniformly 6.5 percent to conform to the ratio between the production potential of the base acreage, 404 million bushels, and the 1946 production goal, 378 million bushels. (404 : 378 :: 100 : X; X = 93.5)
- 7/ Column 4 times column 2; representing the proportionate shares of the respective States in the national production goal.

IRISH POTATOES: Analysis of Production Needs Out of 1946 Crop

<u>For Food:</u>	<u>Millions of Bushels</u>
1. Civilian <u>1/</u>	288.0
2. Military <u>2/</u>	15.0
3. Total food <u>3/</u>	303.0
<u>For Other Uses:</u>	
1. Seed <u>4/</u>	45.9
2. Feed and waste <u>5/</u>	24.1
3. Starch <u>6/</u>	5.0
4. Total uses	75.0
<u>Production Needed <u>7/</u></u>	378.0

- 1/ Including 0.6 million bushels for canning and 0.4 million bushels for dehydration, leaving 287.0 million bushels for fresh consumption, equivalent to 123.0 pounds per capita for a population of 140 million.
- 2/ Including negligible quantities for processing, based upon a total complement of 4 million persons in all military and war Service Forces.
- 3/ Estimated exports of 2.0 million bushels to Latin America, 1.3 million bushels to U.S. Territories, and 0.7 million bushels to Canada expected to be offset by estimated imports of 4.0 million bushels from Canada, and excluded to simplify accounting.
- 4/ Including both imports and domestic stocks, quantities used on the farm as well as those sold, and representing an average seeding of 17 bushels per acre on 2.7 million acres planted.
- 5/ Based on 6.375 percent of 378.0 million bushels.
- 6/ Commercial operations only; governmental diversion out of surplus, if any.
- 7/ Assuming excess carry-over from 1945, crop is not to be offset against 1946 commercial early production by way of reduction in 1946 requirements.

IRISH POTATOES: Suggested State Goals for 1946

State and Region	Suggested 1946 Goal		Acreage		% Acreage Goal is of	
	Production	Acreage	1945	1937-41	1945	1937-41
			Indi- cated	Indi- cated	Indi- cated	Indi- cated
	1,000 bus.	1,000	1,000	1,000	Percent	Percent
Maine	51,520	184	211	156	87	113
N. H.	930	6	7	7	86	86
Vt.	1,441	11	12	13	92	85
Mass.	3,080	22	24	16	92	138
R. I.	1,140	6	7	4	86	150
Conn.	3,400	20	22	15	91	133
N. Y.	26,100	180	187	204	96	88
N. J.	11,008	64	72	54	89	119
Pa.	18,480	154	157	179	98	86
N. E.	117,099	647	699	648	93	160
Ill.	2,550	30	29	38	103	79
Ind.	4,032	36	34	51	106	71
Iowa	3,895	41	38	58	108	71
Mich.	17,407	169	174	228	97	74
Minn.	16,128	192	175	238	110	81
Mo.	3,312	36	35	43	103	84
Nebr.	8,625	69	66	83	105	83
Ohio	7,242	71	65	100	109	71
S. Dak.	2,210	34	35	30	97	113
Wis.	11,645	137	131	190	105	72
N. C.	77,046	815	782	1,059	104	77
Del.	352	4	4	4	100	100
Md.	1,900	19	19	23	100	83
Va.	7,820	68	70	78	97	87
W. Va.	2,728	31	31	32	100	97
N. C.	7,700	77	72	82	107	94
Ky.	3,360	42	43	42	98	100
Tenn.	2,870	41	41	41	100	100
E. C.	26,730	282	280	302	101	93
Ala.	4,680	52	50	49	104	106
Ark.	3,096	43	39	40	110	108
Fla.	4,030	31	36	33	86	94
Ga.	1,539	27	27	23	100	117
La.	3,016	52	51	42	102	124
Miss.	1,820	28	27	22	104	127
Okla.	1,595	29	25	30	116	97
S. C.	2,400	24	21	24	114	100
Tex.	4,575	61	63	53	97	115
South.	26,751	347	339	316	102	110
Ariz.	1,000	5	7	1	71	500
Calif.	30,550	94	117	69	80	136
Colo.	16,340	86	102	86	84	100
Idaho	35,420	161	198	130	81	124
Kansas	1,800	24	24	27	100	89
Mont.	2,120	20	22	17	91	118
Nev.	555	3	4	2	75	150
N. Mex.	375	5	5	4	100	125
N. Dak.	17,762	166	191	143	87	116
Oreg.	9,660	46	55	36	84	128
Utah	2,805	17	19	13	89	131
Wash.	10,080	48	58	41	83	117
Wyo.	1,820	14	15	19	93	74
West.	130,287	689	817	588	84	117
U. S.	377,913	2,780	2,917	2,913	95	95

Suggested
Production Goals
1946

COMMERCIAL EARLY POTATOES

Summary

It is recommended that the 1946 acreage goal for Commercial Early potatoes be fixed at 308,500 acres, estimated as necessary to produce 52 million bushels out of a national production goal of 378 million bushels. For 1945, the commercial early potato acreage goal was 356,200 acres and the production goal was 57.0 million bushels. Actual plantings in 1945 were 358,900 acres and preliminary production estimates total 64.8 million bushels. This compares with a Commercial Early crop of 52.7 million bushels in 1944 and 46.1 million bushels on average during the 10 years ended 1943.

Derivation of National Goal

In determining the national goal, consideration was given primarily to arriving at a production which would obviate the need for governmental purchases under the price support commitment and still provide an adequate supply for food and seed. As pointed out in more detail below, the question of whether or not governmental purchases of potatoes will be necessary out of the 1946 Commercial Early crop depends to a large extent upon the effectiveness of 1945 surplus removal operations. Determination of the national potato production goal for 1946 was a necessary preliminary step in order to assign an equitable share to the Commercial Early region.

<u>For Food:</u>	<u>Millions of Bushels</u>
1. Civilian <u>1/</u>	288.0
2. Military <u>2/</u>	<u>15.0</u>
3. Total food <u>3/</u>	303.0
 <u>For Other Uses:</u>	
1. Seed <u>4/</u>	45.9
2. Feed and waste <u>5/</u>	24.1
3. Starch <u>6/</u>	<u>5.0</u>
4. Total uses	<u>75.0</u>
 <u>Production Needed</u> <u>7/</u>	378.0

- 1/ Including 0.6 million bushels for canning and 0.4 million bushels for dehydration, leaving 287.0 million bushels for fresh consumption, equivalent to 123.0 pounds per capita for a population of 140 million.
- 2/ Including negligible quantities for processing, based upon a total complement of 4 million persons in all military and War Service Forces.
- 3/ Estimated exports of 2.0 million bushels to Latin America, 1.3 million bushels to U.S. Territories, and 0.7 million bushels to Canada expected to be offset by estimated imports of 4.0 million bushels from Canada, and excluded to simplify accounting.
- 4/ Including both imports and domestic stocks, quantities used on the farm as well as those sold, and representing an average seeding of 17 bushels per acre on 2.7 million acres planted.
- 5/ Based on 6,375 percent of 378.0 million bushels.
- 6/ Commercial operations only; governmental diversion out of surplus, if any.
- 7/ Assuming excess carry-over from 1945, crop is not to be offset against 1946 commercial early production by way of reduction in 1946 requirements.

Derivation of Commercial Early Goal

After determination of the national production goal at 378 million bushels, the 1946 goal for the Commercial Early crop was arrived at by taking the approximate proportionate share which these States have contributed on average to the national production total during the last five years. This was found to be 13.85 percent. The Commercial Early production goal was thereupon established at 52.0 million bushels, or 13.75 percent of the 378-million-bushel goal for the total 1946 crop. Following is a comparison of Commercial Early with U. S. total production of potatoes during the period of years taken as the base for this purpose:

Crops	1941	1942	1943	1944	1945	1941-45 Average	Recom. 1946
	millions of bushels						-
U. S. Total	355.6	370.5	465.0	379.4	432.9	400.7	378.0
Commercial Early	49.5	48.3	62.0	52.7	64.8	55.5	52.0
Percent	13.9	13.0	13.3	13.9	15.0	13.85	13.75

Since a substantial part of the Commercial Early crop of Irish potatoes must be marketed in competition with stocks remaining from the 1945 crop of Late potatoes, the large carry-over which seems probable this year is of especial significance. Estimates of merchantable stocks as of January 1, 1946, range from 125 to 135 million bushels, which would equal the large carry-over from the record 1943 crop. Government purchase and surplus removal operations will determined to a large extent the size of the actual carry-over into 1946. In 1945, January 1 stocks were only 104 million bushels, which, when added to the Commercial Early crop, made a total available supply of 168.8 million bushels. Even with a crop reduction from 64.8 to 52.0 million bushels, the prospective total supply for consumption or other disposition during the Commercial Early marketing season of 1946 will be 177-187 million bushels, about 8 to 18 million bushels more than during the comparable period of 1945. The comparison which follows shows that the total supply which will result from adding 1946 Commercial Early goal production to the midpoint of the range of estimates of January 1 stocks will be larger than that of any year except 1944.

Item	Average 1931-40	1941	1942	1943	1944	1945	Estimated 1946
Jan. 1 Stocks	103.6	111.3	104.3	100.8	134.0	103.5	130.0
Commercial Early Production	43.3	49.5	48.3	62.0	52.7	64.8	52.0
Total Supply	146.9	160.8	152.6	162.8	186.7	168.3	182.0

Included in the estimate of January 1 stocks above are approximately 25 million bushels which may be diverted from the normal channels of trade into various industrial and other uses. Similar disposition was made of more than 5 million bushels out of the January 1, 1941 stocks and about 2 to 4 million bushels out of the carry-over of January 1, 1944. In recommending that the Commercial Early States be given their full proportionate share of the total 1946 production goal, the reduction of January 1 stocks through large-scale surplus removal operations is assumed. The principle adopted and implicit in this recommendation is that, for the duration of the support program, surplus stocks of each crop season should be removed from normal channels of trade, thereby permitting the respective areas to produce new supplies in equitable proportions up to but not exceeding current requirements.

Formula for Determining State Acreage Goals

Several alternative bases were suggested and discussed in the course of developing an acceptable formula. The most logical appeared to be an average of planted acreage during the last five years, either weighted or simple. It was finally decided to recommend as a base the planted acreages for the period 1941-45, giving a weight of 50 percent to the 5-year average and 50 percent again to the average of the last two years. Tending to support this choice are the reasons that (1) it gives more effect to trend than does the straight average, and (2) consequently requires less of an adjustment from the actual acreage levels of more recent years.

Assumed yields per acre in 1946 were agreed upon by the Committee on the basis of recent trends, the probable availability of fertilizer, and other considerations. These yields were then applied to the respective weighted average acreages for the different areas to determine their productive capacity on that base. The aggregate of these extensions was found to be slightly more than 62 million bushels. Since the Commercial Early production goal is 52 million bushels, each of the 1941-45 weighted average acreages was thereupon reduced uniformly by 16.1 percent in accordance with the ratio between the production goal desired and 62 million bushels.

Recommendations regarding goal achievement will accompany the total potato goals statement to be submitted to the States in a short time.

Table 1.

Planted Acreage of Commercial Early Potatoes
1941-45 and Recommended 1946

Crop and State	: 1941-45 : : Average :	1941	1942	1943	1944	1945	: Recommended 1946 10/
thousand acres							
<u>Winter</u>							
Texas 1/	1.6	2.3	1.8	1.0	1.5	1.4	1.3
Florida, S. 2/	11.0	11.0	10.0	11.5	10.5	12.2	9.4
Total	12.6	13.3	11.8	12.5	12.0	13.6	10.7
<u>Early Spring</u>							
Florida, N. 3/	17.1	15.8	15.0	17.1	18.1	19.5	15.1
Texas 1/	10.1	8.2	8.4	11.0	10.8	12.0	9.0
Total	27.2	24.0	23.4	28.1	28.9	31.5	24.1
<u>Late Spring</u>							
California 4/	51.6	39.0	35.0	47.0	64.0	73.0	50.3
Louisiana	27.8	24.0	23.0	30.0	37.0	25.0	24.7
Mississippi	4.4	2.7	3.0	5.7	7.0	3.6	4.0
Alabama	25.8	29.4	25.9	20.0	30.5	23.0	22.1
Georgia, S. 5/	3.3	3.7	3.5	4.0	3.5	1.8	2.5
S. Carolina	15.1	15.5	16.5	17.5	16.0	10.0	11.8
Texas, Other 6/	8.2	7.3	6.4	9.4	9.5	8.6	7.2
Oklahoma	5.1 *	5.0	3.7	12.0	2.8	.7	2.9 *
Arkansas	7.6 *	4.3	4.5	14.5	8.5	4.5	6.0 *
Tennessee	4.9	4.9	4.2	6.1	4.9	4.6	4.0
N. Carolina	32.4	32.0	32.0	40.0	32.9	25.0	25.8
Total	186.2	167.8	157.7	206.2	216.6	179.8	161.3
<u>Summer</u>							
Virginia	37.9	41.7	36.5	38.0	37.8	35.4	31.2
Maryland	5.5	5.2	5.0	6.0	5.4	5.9	4.7
Kentucky	4.1	4.0	4.0	4.5	4.5	3.5	3.4
Missouri	4.9	5.7	5.4	5.4	4.2	4.0	3.8
Kansas	7.5	8.6	7.4	8.5	7.4	5.6	5.9
Nebraska	6.0	5.4	4.1	6.6	6.8	7.2	5.5
Texas, W. 7/	9.1	15.0	6.5	8.0	7.4	8.8	7.2
Georgia, N. 8/	1.9	2.0	1.9	2.4	1.8	1.6	1.5
New Jersey	55.8	48.0	48.0	60.0	61.0	62.0	49.2
Total	132.7	135.6	115.8	139.4	136.3	134.0	112.4
Grand Total	358.7	340.7	311.7	386.2	393.8	358.9	308.5

* Using planting intentions in 1945.

(See page 8 for footnotes.)

Table 2.

Commercial Early Potatoes: Yield per Harvested Acre

Crop and State	10-Year (1932-41) Average	1942	1943	1944	1945	Assumed 1946
bushels per acre						
<u>Winter</u>						
Texas <u>1/</u>	43	50	65	63	58	60
Florida, S. <u>2/</u>	<u>120</u>	<u>165</u>	<u>150</u>	<u>110</u>	<u>215</u>	<u>160</u>
Weighted Average	104	145	142	104	198	147.4
<u>Early Spring</u>						
Florida, N. <u>3/</u>	120	147	119	114	118	125
Texas <u>1/</u>	<u>89</u>	<u>75</u>	<u>85</u>	<u>80</u>	<u>52</u>	<u>90</u>
Weighted Average	110	122	106	101	93	112.8
<u>Late Spring</u>						
California <u>4/</u>	269	350	335	355	325	340
Louisiana	72	72	75	60	65	70
Mississippi	88	95	80	75	95	90
Alabama	126	90	140	58	145	130
Georgia, S. <u>5/</u>	130	85	85	44	165	120
S. Carolina	144	135	125	55	160	145
Texas, Other <u>6/</u>	59	68	70	60	65	65
Oklahoma	99	100	70	75	60	95
Arkansas	87	90	82	70	70	85
Tennessee	100	135	106	80	100	105
N. Carolina	<u>138</u>	<u>142</u>	<u>160</u>	<u>98</u>	<u>170</u>	<u>140</u>
Weighted Average	139	161	164	159	204	177.2
<u>Summer</u>						
Virginia	143	110	170	101	146	140
Maryland	144	110	110	110	140	130
Kentucky	106	135	125	50	110	110
Missouri	147	150	165	125	115	145
Kansas	128	150	150	90	105	130
Nebraska	229	240	260	160	235	230
Texas, W. <u>7/</u>	192 <u>9/</u>	225	225	190	208	200
Georgia, N. <u>8/</u>	109	128	118	82	105	110
New Jersey	<u>176</u>	<u>185</u>	<u>170</u>	<u>130</u>	<u>190</u>	<u>180</u>
Weighted Average	154	157	171	121	171	164.2
<u>Average</u>						
Commercial Early	142	156	162	139	182	166.0

(See page 8 for footnotes.)

Table 3

Commercial Early Potatoes: Basic Data and Formula Computation
of 1946 Acreage Goals

Crop and State	: Weighted*:	Assumed :	: Acreage :	: Production :	
	: Average, :	Yield :	Computed :	Goals :	
	: 1941-45 :	Per Acre :	Production :	(83.9% Coll) :	
	: Acreage :	:	:	Goals :	
	1,000 acres	bushels	1,000 bus.	1,000 acres	1,000 bus.
<u>Winter</u>					
Texas <u>1/</u>	1.5	60	90	1.3	78
Florida, S. <u>2/</u>	<u>11.2</u>	<u>160</u>	<u>1,792</u>	<u>9.4</u>	<u>1,504</u>
Total	12.7	148	1,882	10.7	1,582
<u>Early Spring</u>					
Florida, N. <u>3/</u>	18.0	125	2,250	15.1	1,888
Texas <u>1/</u>	<u>10.7</u>	<u>90</u>	<u>963</u>	<u>9.0</u>	<u>810</u>
Total	28.7	112	3,213	24.1	2,698
<u>Late Spring</u>					
California <u>4/</u>	60.0	340	20,400	50.3	17,102
Louisiana	29.4	70	2,058	24.7	1,729
Mississippi	4.8	90	432	4.0	360
Alabama	26.3	130	3,419	22.1	2,873
Georgia, S. <u>5/</u>	3.0	120	360	2.5	300
S. Carolina	14.1	145	2,044	11.8	1,711
Texas, Other <u>6/</u>	8.6	65	559	7.2	468
Oklahoma	3.4 **	95	323	2.9	276
Arkansas	7.1 **	85	604	6.0	510
Tennessee	4.8	105	504	4.0	420
N. Carolina	<u>30.7</u>	<u>140</u>	<u>4,298</u>	<u>25.8</u>	<u>3,612</u>
Total	192.2	182	35,001	161.3	29,361
<u>Summer</u>					
Virginia	37.2	140	5,208	31.2	4,368
Maryland	5.6	130	728	4.7	611
Kentucky	4.0	110	440	3.4	374
Missouri	4.5	145	652	3.8	551
Kansas	7.0	130	910	5.9	767
Nebraska	6.5	230	1,495	5.5	1,265
Texas, W. <u>7/</u>	8.6	200	1,720	7.2	1,440
Georgia, N. <u>8/</u>	1.8	110	198	1.5	165
New Jersey	<u>58.7</u>	<u>180</u>	<u>10,566</u>	<u>49.2</u>	<u>8,856</u>
Total	133.9	164	21,917	112.4	18,397
Grand Total	367.5	169	62,013	308.5	52,038

* (1941-45 given weight of 50 percent)
(1944-45 given weight of 50 percent)

** Using planting intentions in 1945.

(See page 8 for footnotes.)

Table 4

Commercial Early Potatoes: Acreages Planted in Relation to Goals
in 1944 and 1945 and Acreage Goals Recommended for 1946

Crop and State	: Planted Acreage :		Percent Planted		: Goal Acreage		
	: 1944 :	: 1945 :	: Acreage is of Goal :		: Final :	: Final :	: Recom.
	: : :	: : :	: 1944 :	: 1945 :	: 1944 :	: 1945 :	: 1946 :
	1,000 acres		percent		1,000 acres		
<u>Winter</u>							
Texas <u>1/</u>	1.5	1.4	150.0	70.0	1.0	2.0	1.3
Florida, S. <u>2/</u>	10.5	12.2	84.0	81.3	12.5	15.0	9.4
Total	12.0	13.6	88.9	80.0	13.5	17.0	10.7
<u>Early Spring</u>							
Florida, N. <u>3/</u>	18.1	19.5	107.1	105.4	16.9	18.5	15.1
Texas <u>1/</u>	10.8	12.0	98.2	57.7	11.0	14.0	9.0
Total	28.9	31.5	103.6	96.9	27.9	32.5	24.1
<u>Late Spring</u>							
California <u>4/</u>	64.0	73.0	139.4	132.7	45.9	55.0	50.3
Louisiana	37.0	25.0	121.3	82.0	30.5	30.5	24.7
Mississippi	7.0	3.6	134.6	69.2	5.2	5.2	4.0
Alabama	30.5	23.0	164.9	92.0	18.5	25.0	22.1
Georgia, S. <u>5/</u>	3.5	1.8	100.0	60.0	3.5	3.0	2.5
S. Carolina	16.0	10.0	96.4	90.9	16.6	11.0	11.8
Texas, Other <u>6/</u>	9.5	8.6	115.9	104.9	8.2	8.2	7.2
Oklahoma	2.8	.7	45.2	17.5	6.2	4.0	2.9
Arkansas	8.5	4.5	160.4	84.9	5.3	5.3	6.0
Tennessee	4.9	4.6	87.5	115.0	5.6	4.0	4.0
N. Carolina	32.9	25.0	101.2	83.3	32.5	30.0	25.8
Total	216.6	179.8	121.7	99.2	178.0	181.2	161.3
<u>Summer</u>							
Virginia	37.8	35.4	107.4	98.3	35.2	36.0	31.2
Maryland	5.4	5.9	84.4	115.7	6.4	5.1	4.7
Kentucky	4.5	3.5	97.8	77.8	4.6	4.5	3.4
Missouri	4.2	4.0	89.4	100.0	4.7	4.0	3.8
Kansas	7.4	5.6	115.6	112.0	6.4	5.0	5.9
Nebraska	6.8	7.2	98.6	109.1	6.9	6.6	5.5
Texas, W. <u>7/</u>	7.4	8.8	88.1	118.9	8.4	7.4	7.2
Georgia, N. <u>8/</u>	1.8	1.6	94.7	84.2	1.9	1.9	1.5
New Jersey	61.0	62.0	102.5	112.7	59.5	55.0	49.2
Total	136.3	134.0	101.7	106.8	134.0	125.5	112.4
Grand Total	393.8	358.9	111.4	100.8	353.4	356.2	308.5

(See page 8 for footnotes.)

Footnotes:

- 1/ Cameron and Hidalgo Counties (Lower Valley).
- 2/ Brevard, Hillsborough and Polk, and all counties south of these counties.
- 3/ Alachua, Bradford, Clay, Flagler, Putnam, St. Johns, Union, Volusia, Gadsden, Calhoun, Holmes, and Escambia Counties.
- 4/ Early acreage in Alameda, Monterey, San Mateo, Santa Clara, Santa Cruz, Sacramento, Fresno, Kern, Madera, Merced, San Joaquin, Tulare, Los Angeles, Orange, Riverside, San Bernardino, San Diego, and Santa Barbara Counties.
- 5/ Counties south of the Fall Line with Berrien, Bryan, Chatham, Cook, Effingham, Liberty, and Mitchell the principal counties.
- 6/ Bexar, Colorado, Ft. Bend, Wharton, and all other commercial potato counties north except Texas Panhandle counties.
- 7/ (Panhandle) Bailey, Castro, Dallam, Deaf Smith, Floyd, Hale, Lamb, Lubbock, and Swisher Counties.
- 8/ Counties north of the Fall Line with Fannin, Gilmer, Habersham, Lumpkin, Rabun, Towns, Union, and White the principal counties.
- 9/ Short-time average (1939-41).
- 10/ Uniform reduction of 16.1 percent in the 1941-45 average of planted acreage, weighted 50 percent to 1941-45 and 50 percent to 1944-45.

Suggested
Production Goals
1946

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SWEETPOTATOES

Summary: It is recommended that the 1946 acreage goal for sweetpotatoes be fixed at 750,000 acres. This acreage with average growing conditions should produce approximately 66 million bushels. Plantings in 1945 amounted to 719,300 acres, of which 712,000 acres were harvested. Due to yields averaging 94.5 bushels per acre as compared with a 10-year (1934-43) average yield of 84.2 bushels, a production this year of 67,275,000 bushels was estimated as of November 1. The 1946 production goal of 66,000,000 bushels compares with a production in 1943 of 72,572,000 bushels and in 1944 of 71,651,000 bushels.

Derivation of Goal: The total production requirement for sweetpotatoes from the 1946 crop is estimated at 69 million bushels, which is equal to the average production for the last 5 years. An acreage of 750,000 acres is estimated to provide an adequate supply of sweetpotatoes for food and seed while minimizing the necessity for governmental purchases. Details of the production needs from the 1946 crop are estimated as shown in column 3 of table 1.

Determination of the Acreage Goal: Assuming 1946 growing conditions by States will average the same as prevailed during the 10-year (1936-45) period, the goal of 750,000 planted acres will result in a production of 65,968,000 bushels. This represents a weighted average yield of 88.0 bushels per planted acre. This yield compares to a 1936-45 average yield of 86.0 bushels per planted acre, 80.9 bushels in 1943, 92.9 bushels in 1944, and a yield of 94.2 bushels indicated for 1945 on November 1.

The goal of 750,000 acres compares with indicated plantings in 1945 of 719,300 acres, actual plantings of 777,300 acres in 1944, 907,300 planted acres in 1943, and a 1941-45 average of 772,000 acres. The suggested national goal was apportioned among the various States largely on the basis of the averages planted in previous years with allowance for trends, and making adjustments for certain acres where marketing problems have arisen more or less regularly.

Owing to the wide variation in sweetpotato yields, the suggested goal of 750,000 acres might produce in 1946 only 61 million bushels computed at 1943 yields or as high as 71 million bushels if the 1945 indicated yields are attained in 1946.

Other Considerations: Surpluses of sweetpotatoes rarely occur because of a total U. S. overproduction. They generally occur during the main harvesting period and are the result of heavy production in commercial areas where facilities for orderly marketing are inadequate.

The curing and storing of sweetpotatoes has always presented a serious problem in the orderly marketing of the crop. In some areas the growers and shippers sell the entire crop as soon as harvested. In these areas a small surplus can create an acute marketing problem because of the inability of the regular market channels to absorb additional supplies during the harvesting period. Curing and storage facilities in these areas could combine high production with satisfactory prices by spreading the supply over a longer marketing season. Areas where Government support has rather consistently been necessary at harvest time should give serious consideration to the establishment of adequate curing and storage facilities for that part of the production which cannot be marketed profitably at harvest time.

Removal of low-grade sweetpotatoes from the fresh market will do much to improve marketing of the crop. Consumption should be increased materially if consumers were consistently to have available high quality sweetpotatoes.

The fresh market variety preferences are Puerto Rico, Jersey, Nancy Hall, Golden and during the harvesting period, the Triumph. It is important not only to plant the preferred market varieties but to select good seed stock of such varieties.

SWEETPOTATOES:

Estimated Disposition for 1944-45 and Requirements for 1945-46 and 1946-47
(thousands of bushels, farm weight basis)

Table 1

	: Estimated : Disposition : 1944-45	: 1945-46 : Require- : ments	: 1946-47 : Require- : ments
Fresh Use:			
U. S. Civilians	49,343	48,000	50,655 <u>1/</u>
Military and War Services	1,045	1,021	457
Exports and Shipments	409	240	160 <u>2/</u>
Total	50,797	49,261	51,272
Processing:			
Canning	866	577	885
Dehydration	1,938	636	47
Starch	100	0	<u>3/</u>
Total	2,904	1,213	932
Seed	3,650	4,000	4,000
Allowance for feed and waste <u>4/</u>	14,300	12,778	13,184
Total U. S. Supply or Estimated Requirements from U. S. Production	71,651	67,252	69,388

1/ Equivalent to 20 pounds per capita.

2/ For Canada and Caribbean Area.

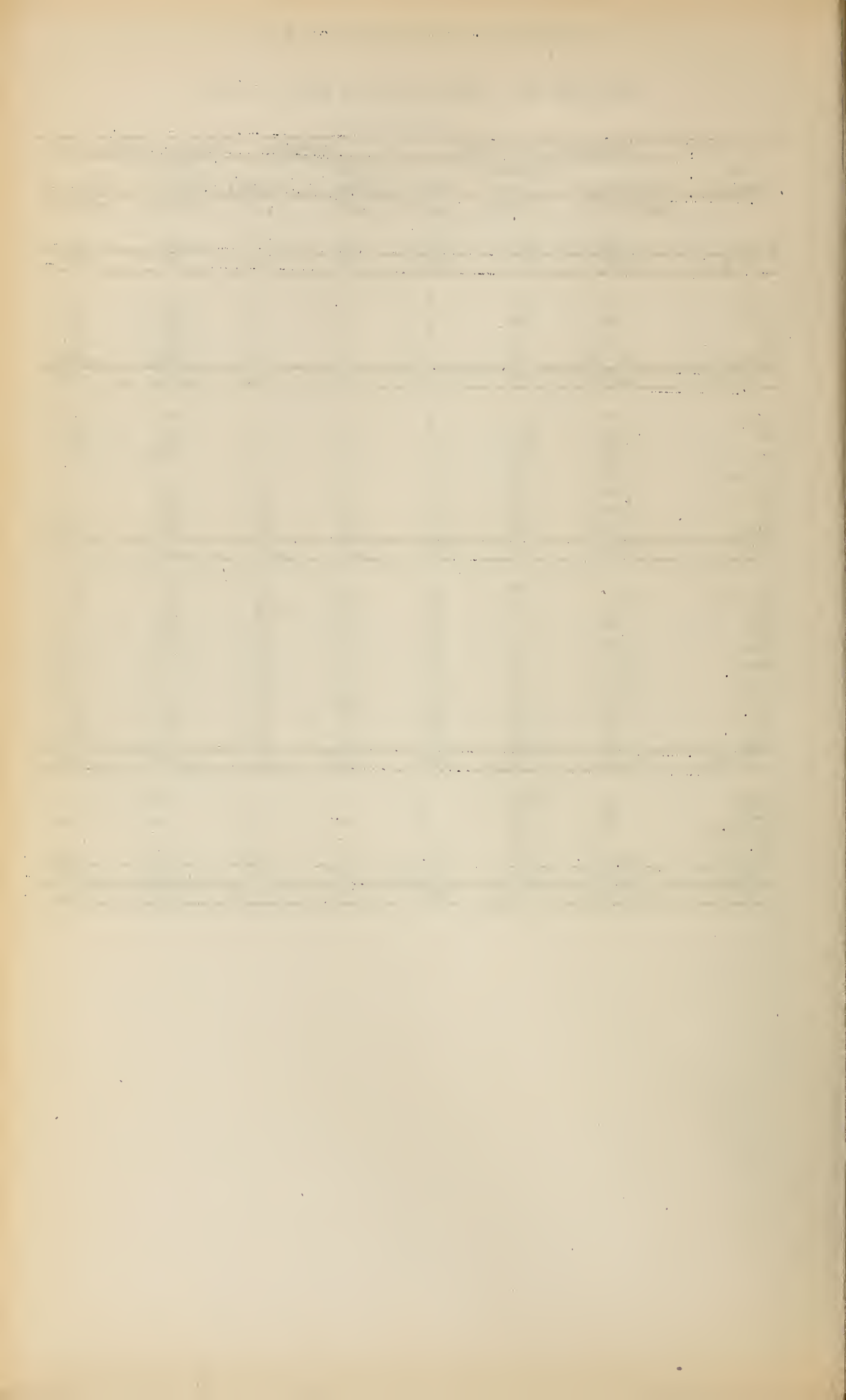
3/ No allowance is made for sweetpotato starch because the corresponding raw material is not included in the official production estimates in Florida.

4/ The allowance for feed and waste is estimated to be 20 percent of the 1944-45 production and 19 percent of both the 1945-46 and the 1946-47 production.

Proposed Price Support: The price support program for the 1946 crop of sweetpotatoes will be announced at a later date.

SWEETPOTATOES: Suggested State Goals for 1946

State	Suggested 1946 Goal	Acreage	% A. Goal is of
and	: Assumed :	: 1945 :	: 1945 :
Region	: Production :	Yield : Acres :	Indic. : 1937-41 : Indic. : 1937-41
	1,000 bu.	bushels 1,000	1,000 1,000 1,000 Percent Percent
N. J.	2,240	140	16 16 15 100 107
N. E.	2,240	140	16 16 15 100 107
Ind.	240	120	2 1.8 2.7 111 74
Ill.	356	89	4 4 3 100 133
Ia.	235	94	2.5 2.5 2 100 125
Miss.	6 37	91	7 7 8 100 88
N. C.	1,468	95	15.5 15.3 15.7 101 99
Del.	432	144	3 3 3 100 100
Md.	1,312	164	8 8 8 100 100
Va.	3,300	110	30 33 33 91 91
W. Va.	180	90	2 - - - -
N. C.	7,770	105	74 70 79 106 94
Ky.	1,290	86	15 16 15 94 100
Tenn.	4,042	94	43 33 47 130 91
E. C.	18,326	105	175 163 185 107 95
S. Car.	6,072	92	66 62 54 106 122
Ga.	7,546	77	98 97 104 101 94
Fla.	1,206	67	18 18 18 100 100
Ala.	6,084	78	78 69 78 113 100
Miss.	5,984	88	68 65 68 105 100
Ark.	1,782	81	22 20 27 110 81
Ia.	7,957	73	109 120 95 91 115
Okla.	864	72	12 10 11 120 109
Tex.	4,536	81	56 51 56 110 100
South.	42,031	80	527 512 511 103 103
Kans.	413	118	3.5 4 3 88 117
Ariz.	180	90	2 - - - -
N. Mex.	90	90	1 - - - -
Calif.	1,220	122	10 9 12 111 83
West.	1,903	115	16.5 13 15 127 110
U. S.	65,968	83.0	750 719.3 740.9 104 101



Suggested
Production Guide
1946

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FRESH AND PROCESSED VEGETABLES FROM COMMERCIAL TRUCK CROP AREAS

Demand for Commercial Truck Crops in 1946

Total demand for commercial truck crops for fresh use and for processing in 1946 is expected to provide a market for an aggregate production somewhat smaller than in 1945--nearly as large for truck crops for fresh use but moderately smaller for truck crops for processing--at prices lower than in 1945, but generally higher than prewar.

Although national income may be moderately lower in 1946 than in 1945, consumer purchasing power is not expected to decline in the same degree. This will tend to sustain civilian demand nearer the 1945 level than otherwise would be the case. Increased availability of many other food and non-food items, however, will mean increased competition for the consumer's spendable income, and this will tend to weaken the demand for vegetables.

Government needs of commercially canned vegetables for the 1946-47 pack season are expected to be somewhat less than the revised 1945-46 requirements, which amount to an estimated 12 percent of the pack. Because of the abrupt end of the war, 1945-46 government requirements were cut sharply below the preceding year, when the government purchased about one-third of the pack. Government requirements for fresh vegetables during the war period never exceeded 5 percent of production. Part of the decline in government requirements, however, will be offset by additional civilian demand arising through the shift in military personnel to civilian status.

Demand for commercial production of truck crops for fresh use and for processing in 1946 will be conditioned not only by total demand for such items but also by vegetable production in city, farm, and market gardens, production of new potatoes, stocks of old potatoes, and stocks of canned and otherwise processed vegetables. With the war ended, many of the wartime incentives for home gardens will be gone; it is believed that "victory" or city-garden production may be considerably smaller in 1946 than in 1945, and farm-garden production slightly smaller. Market-garden production is expected to remain about constant except as influenced by the weather.

From the above it may be seen that total demand for truck crops (fresh and processed) in 1946 probably can be met with production slightly less than in 1945. With a decreased production estimated as necessary to meet the total demand for truck crops in 1945, limits to our production capacity no longer need be given serious consideration.

Suggested Production Guide

Fresh Vegetables from Commercial Truck Crop Areas

This section of the report discusses only fresh vegetables from the reported commercial truck crop acreage. The figures are given for only the commercial truck crop part of fresh vegetables from all sources. The commercial truck crop acreage does not furnish all the fresh vegetable requirements. Market gardens, farm and nonfarm gardens furnish a considerable part of the total supply.

Artichokes

Winter: As indicated in the "1946 Production Statement on Winter Vegetables", prices for the 1945 season (September 1944 to April 1945) averaged about \$3.70 per box as compared to the 1934-43 average of \$1.86. The demand in 1946 should be adequate to move the crop likely to be produced on the presently intended 6,000 acres.

Asparagus

Production of asparagus for both the fresh market and processing has not kept pace with wartime demand. The 1945 early spring acreage was 7 percent smaller than the 10 year average, and the entire 1945 acreage for all purposes was only 5 percent larger than average. At the same time the estimated 1945 canned pack is about 50 percent larger and the frozen pack between 150 and 200 percent larger than the 5 year (1937-41) average.

Thus there has been steadily diminishing supplies for the fresh market, with price levels advancing during the war, reaching a peak in 1945. Carlot shipments declined from 2,929 in 1940 to only 953 cars in 1945. Reduced government **procurement** of both canned and frozen asparagus in 1946 should make more asparagus available for the fresh market from both early and late spring areas. Nevertheless, it is expected that civilian demand for processed asparagus will be above prewar levels.

Early Spring: Yields in early spring 1945 were above average; otherwise the shortage of fresh asparagus would have been even more acute. Early spring acreage in 1946 is expected to be 3 percent smaller than in 1945. It seems probable that the pack of frozen and canned asparagus will be larger than prewar. If average yields are obtained the early spring supply of asparagus for the fresh market in 1946 will be substantially smaller than the prewar supply. Even with decreased demand, prices are not expected to be greatly below those received during the early war years.

Late Spring: Acreage harvested in 1945 was increased only 2 percent over 1944 but was 38 percent larger than the 10 year average. Most of the increased production, however, has been used for processing. An increase of less than 2 percent in 1946 over 1945 in acreage for late spring harvest is expected. With reductions in government purchases for canned and frozen asparagus and a small purchasing power in 1946 the prospective supply may result in prices to growers less favorable than in 1945.

Lima Beans

The indicated 1945 total production of lima beans is 1,358,000 bushels; 221,000 bushels more than in 1944 and 100,000 bushels more than the 10 year (1934-43) average. The increase in production in 1945 over 1944, is due mostly to a record yield per acre. Improved quality from new varieties is expected to aid in demand. These new varieties may benefit lima bean growers from the standpoint of increased yields and reduction in costs.

Winter: The acreage of the 1945 winter crop of lima beans was 33 percent above the 1944 acreage. Better-than-average yields together with increased acreage resulted in a production of 140,000 bushels; 35,000 bushels above 1944 and 44,000 bushels above average. Prices to growers in 1945 averaged 85 cents per bushel lower than the 1944 price of \$5.10 but \$1.67 per bushel more than average. Imports of fresh lima beans are not expected from Cuba because of production difficulties. An increase of 10 percent in acreage for the 1946 winter crop of lima beans, should be sufficient to meet market demand.

Spring: The 1945 spring crop of 465,000 bushels was approximately 10 percent larger than the 1944 crop. The acreage in 1945 was about equal to the acreage in 1944, but 17 percent less than average. Favorable growing conditions resulted in yields 12 percent above 1944 and 30 percent above average. The average price for the 1945 crop was \$3.86 per bushel; the price was \$3.34 in 1944 and the 10 year (1934-43) average, was \$1.45. An increase of 20 percent in the 1946 acreage would result in an acreage equal to prewar levels.

Summer: Summer acreage in 1945 was 8,620 acres or about equal to 1944 and 8 percent less than average. Favorable growing conditions resulted in yields 22 percent above 1944, and 10 percent above average. The production of 703,000 bushels in 1945 was considerably greater than that in 1944 and the 10 year average. Prices to growers for the summer crop of lima beans in 1945 averaged \$3.49 per bushel, \$1.20 per bushel above the price to growers in 1944, and \$1.92 per bushel above average. In areas where the labor supply is adequate it appears that production from an increase up to 20 percent in acreage over 1945 could be marketed without serious difficulty.

Fall: The 1945 fall acreage was 750 acres, 10 percent below the acreage of 1944 and 5 percent below average. Yields per acre in 1945 were 33 percent above yields in 1944. Production of the fall 1945 crop was approximately 7,000 bushels above that in 1944 when production was 38,000 bushels, and 9,000 bushels above average. Prices have held up well in the fall of 1945. The market should be able to absorb production from an acreage 20 percent larger than 1945.

Snap Beans

Production in 1945 amounted to approximately 15,300,000 bushels, harvested from about 169,000 acres. In 1945, it seems likely that a total production of about 15,560,000 bushels could be marketed without serious difficulties providing this quantity includes a high proportion of the varieties preferred by consumers.

It is suggested that the seasonal pattern for 1946 follow the pattern of the 1944 and 1945 seasons, as shown in the following table:

Proportion of annual commercial production of snap beans
for fresh market shipment, by seasons

	Winter (Jan.-Mar.) Percent	Spring (Apr.-June) Percent	Summer (July-Sept.) Percent	Fall (Oct.-Dec.) Percent	Total Percent
1934-43 average	13	35	25	27	100
1944	19	26	32	23	100
1945	17	24	31	28	100
Suggested 1946*	18	25	32	25	100

* Average of percentage distribution in 1944 and 1945.

Winter: The 2,625,000 bushel crop of winter season snap beans produced in Florida in 1945 was only 8 percent below the record crop of the year before, and was the result of above-average yields on a near-record acreage. Record-high prices were received by growers for this crop, reflecting the strong consumer demand evident at that time. Florida canneries used considerable quantities of snap beans from the 1945 winter crop.

Commercial growers of winter snap beans for the fresh market in 1945 might be able to move satisfactorily a quantity equal to 18 percent of the suggested annual production, or 2,800,000 bushels. With average yields this quantity could be produced on 35,453 acres. Therefore, no change in winter-crop acreage from 1945 is suggested.

Spring: Commercial production of snap beans for fresh market shipment has been declining in spring-crop areas. Production in 1945, at 3,738,000 bushels, was 8 percent smaller than in 1944 and nearly 29 percent smaller than average. Acreage harvested in 1945 was 21 percent smaller than in 1944, and 30 percent smaller than average.

Snap bean production in most southern states is utilized by both fresh and processing outlets. It is not the general practice of growers in these States to contract with processors. Fresh market supplies can readily become burdensome if processing outlets are not available. Production for fresh market in the spring areas equal to 25 percent of the suggested annual production for 1946, or about 3,890,000 bushels, would seem appropriate. This quantity could be produced on a harvested acreage about 9 percent larger than in 1945.

Summer: Commercial production of summer-season snap beans for fresh market shipment in 1945 was 4,814,000 bushels, only 3 percent below 1944, but nearly 29 percent above average. This crop was produced on 43,910 acres. Acreage harvested in 1944 was 46,350 acres, 12,670 acres more than average. Acreage and production in this seasonal group have shown a decided upward trend.

Growers generally have received a lower average price for summer-season snap beans than for snap beans produced in other seasons. In 1945, however, growers for such beans generally received unusually favorable prices, and this experience may tempt them to overplant for the summer season in 1946. If a 10 year average yield is obtained, a summer season production of 4,979,200 bushels, (equal to 32 percent of the suggested annual production) would require 45,681 acres. This acreage would be 4 percent larger than the acreage in 1945 and 36 percent larger than average.

Fall: Commercial production of snap beans for fresh market shipment during the fall of 1945 was about 4,229,000 bushels, 20 percent larger than in 1944 but only 5 percent above average. Acreage for fall harvest in 1945, at 41,100 acres was 3 percent above that in 1944 and about the same as the average fall acreage harvested.

If 25 percent of the suggested 1946 annual production, or 3,890,000 bushels, is to be produced in the fall-crop areas, 39,393 acres for harvest would be required. Such an acreage would be about 4 percent smaller than in 1945 and 4 percent below average.

Beets

The 1945 acreage of beets for fresh market dropped below the 10 year (1934-43) average. Dehydration furnished an outlet for some beets in 1945 but this use will be virtually eliminated in 1946.

Winter: The winter acreage in 1945 was about 15 percent less than in 1944 but 15 percent above the 10 year average. Yield per acre in 1945 was about 15 percent above average. The price to growers averaged 41 cents per bushel which was slightly below the 1944 price. It now appears that a decrease of 10 percent in acreage would be desirable; especially since it is likely that prices may average somewhat below those of 1945.

Spring: Acreage was reduced from a 10 year average of 2,280 acres, to 1,390 acres in 1944 and to 1,380 acres in 1945. Price and market conditions during 1945 were satisfactory and the 1945 acreage and production should be maintained in 1946.

Summer: Acreage of summer beets has been fairly constant. The 10 year average acreage was 2,630 acres; 1944 was 3,050; and the 1945 acreage was 2,800. Production has increased slightly due to larger yields per acre. Summer beet prices in 1945 were good, but with prospective decreases in demand in 1946, plantings should not be increased.

Cabbage

Winter: Preliminary reports of 1946 intentions to plant indicate a 2 percent acreage increase over 1945 acreage. With average yields, the intended 66,950 acres in 1946 would produce approximately 366,800 tons, 37 percent more than average, but 18 percent less than in 1945. While growers failed to dispose of a considerable quantity because of a poor market, prices to growers still averaged \$33.29 per ton for the 1945 winter crop. Production plans should not contemplate the use of winter crop cabbage for sauerkraut unless under contract. Because of the expected large carry-over of storage cabbage and the cancellation of government contracts for dehydrated cabbage, a 5 percent reduction in the 1946 acreage of winter cabbage seems desirable.

Spring: Spring acreage in 1945 was only slightly above that of 1944 and 6 percent above average. Favorable growing conditions and above average yields resulted in a 1945 production 19 percent greater than in 1944 and 21 percent above average. The average price to growers for the spring crop in 1945 was \$36.16 per ton; in 1944, \$34.25 and the average was \$23.90. Largely through government assistance was serious wastage averted in 1945. If growers are to avoid serious marketing difficulties in 1946 a reduction of at least 5 percent in the spring acreage appears desirable.

Summer: The summer acreage in 1945 was about equal to that of 1944 but 10 percent below average. Favorable growing conditions and higher-than-average yields resulted in production 25 percent greater than in 1944 but about equal to the average. Prices to growers averaged \$35.35 per ton in 1945. A 1946 summer acreage equal to that of 1945 seems justified.

Fall: Favorable growing conditions and an increased acreage resulted in record crops of both Danish and domestic types of cabbage in 1945. Serious marketing difficulties were averted in 1945 largely by extremely good demand for cabbage for kraut. Considerable quantities of cabbage grown for fresh market were diverted to this outlet. Even so, some government purchases were made in certain areas. In order to avert marketing difficulties in 1946 a 20 percent reduction in the 1946 acreage for fresh market appears necessary.

Cantaloups

Spring: The spring crop of 2,373,000 crates in 1945 was 5 percent larger than in 1944 but a little less than the 10 year (1934-43) average. Quality was excellent with melon sizes running fairly large. The yield of 146 crates to the acre in 1945 was above average and also above the 1944 yield. The spring cantaloup acreage in 1945 was 5 percent less than in 1944 and 11 percent below average. Average price to growers of \$3.30 per standard crate in 1945 was 45 cents less than in 1944. In 1946 a market outlet seems probable for the production grown on a spring acreage about 10 percent larger than that of 1945.

Summer: The 1945 summer production of cantaloups was a record. The 1945 yield per acre was about 4 percent less than that of the preceding year, but approximately 7 percent above average. Summer cantaloup acreage was increased sharply in 1945. Average 1945 price to growers was \$2.65 per standard crate, about 12 percent greater than that received in 1944. In 1946 the production from a summer acreage about equal to that of 1945 should meet a steady demand.

Honeyball Melons

Spring: Growers of honeyball melons in the California Imperial Valley planted 1,530 acres in 1945; a 47 percent increase above 1944, but a considerable reduction below the 10 year average of 2,650 acres. The above-average yield of 150 crates to the acre was 15 crates below the high yield of the previous

year. The 1945 production of 230,000 crates was 34 percent greater than that of 1944, and 49 percent above average. In 1945 the average price to growers was \$3.10 per standard crate which was 40 cents less than the comparatively high price in 1944. Despite a downward trend in acreage, it is possible that a market exists in 1946 for the production from an acreage equal to 1945 or as much as 20 percent greater than that of 1945.

Honeydew Melons

Spring: Spring acreage of honeydew melons in the California Imperial Valley in 1945 was slightly larger than in 1944 but about 26 percent below the 10 year (1934-43) average. The yield of 200 crates per acre in 1945 was 5 percent larger than that in 1944, but about 25 percent less than average. Production of 634,000 standard honeydew crates in 1945 exceeded the previous season's 578,000 crates but was far below the average of 1,167,000 crates. The 1945 average price of \$2.15 per crate received by growers, was close to the \$2.20 average in 1944. Despite a downward trend in acreage, it is possible that a market will exist in 1946 for the production from an acreage equal to 1945 or as much as 20 percent greater than that of 1945.

Summer: The 1945 summer production was about 40 percent larger than that of 1944, and more than double the 1934-43 average. Acreage was increased 44 percent over that of 1944 and was double the average. A yield of 267 crates per acre during the 1945 summer season, while slightly lower than in 1944, was well above the 10 year average of 247 crates. The average price of \$1.85 per standard honeydew crate in 1945 was 13 cents per crate higher than in 1944. In 1946 an acreage approaching the 1945 record acreage should meet a steady demand.

Carrots

Winter: Apparently the demand for winter carrots has increased more rapidly than the demand for other fresh vegetables. The 1945 production was about 15 percent greater than 1944, largely because of high yields per acre, and was nearly double the 1934-43 average. Prices to growers averaged \$1.10 per bushel or slightly below 1944. With a large fall crop, it appears that there will be a fairly large carry-over into the winter season. Anticipated heavy requirements for canning and dehydration, mentioned in the production guide for winter vegetables, have largely disappeared with the ending of the war. It appears that even with acreage reduced 15 percent below 1945, grower prices in 1946 might average somewhat lower.

Spring: In 1945, acreage and production of spring carrots were about 15 percent greater than in 1944, with about average yields in both years. Prices to growers averaged \$1.95 per bushel for the season, but some marketing difficulties and lower prices were encountered in Texas. Purchases for canning and dehydration will be much lower in 1946 and contracts should be secured by growers who expect to market through these outlets. Unless acreage is reduced, by at least 15 percent in 1946 lower prices and marketing difficulties may be expected.

Summer: The acreage of summer carrots in 1945, with average yields, produced about 10 percent more than the same acreage in 1944 with low yields. Prices to growers averaged \$1.68 per bushel for the 1945 season, or about 30 cents per bushel above 1944. A slightly smaller acreage than that of 1945 should be adequate.

Fall: The 1945 fall carrot acreage was 10 percent above 1944, and production in 1945 was estimated to be about 20 percent higher. It appears likely that the 1945 fall crop average price will be less than the \$1.29 average for 1944. Largely because of a substantial demand for carrots for processing, fall production has increased to about $2\frac{1}{2}$ times the prewar average. Unless acreage is reduced as much as 30 percent below the 1945 acreage in 1946, serious marketing conditions and lower prices are likely.

Cauliflower

Acreage and production increased gradually through the 1930's and early 1940's, reaching an all-time high in 1945. In 1945, the 35,970 acres for harvest exceeded the previous record (1942) by 12 percent, while the production of 10,818,000 crates passed the previous record (1940) by 10 percent. The year to year increase has been rather uniform. Prices were lower in 1945 than in either of the preceding two years. About 4 percent of the 1945 crop was used for freezing, a large increase over the prewar years.

Winter: The record 1945 winter acreage and production met a good demand and brought prices not far below those of the preceding two years. "The Production Guide for Winter Plantings" in 1946 suggested a 5 percent reduction in acreage. A preliminary estimate indicates that because of heavily increased plantings in California acreage will exceed the previous record (1945) by 12 percent. If average growing conditions prevail production will exceed the 1945 record production by 7 percent.

Spring: Acreage in 1945 was 13 percent larger than in 1944, but 13 percent below the 1937 record acreage. Production, however, was 7 percent below 1944, when unusually high yields were obtained. Prices to growers in 1945 were somewhat higher than a year earlier. It appears that spring acreage should be reduced at least 10 percent below that of 1945 if marketing difficulties are to be avoided.

Summer: Acreage and production in 1945 were 8 and 5 percent, respectively, higher than the previous 1940 record. Prices to growers in 1945 were substantially higher than in 1944 and about the same as in 1943. A reduction in acreage of 8 percent below 1945, should give a 9 percent smaller production, which should be about all the market will absorb.

Fall: Acreage and production set new records in 1945, exceeding the previous acreage record (1939) by 13 percent and the previous production record (1940) by 15 percent. All fall producing areas increased their acreage substantially in 1945 and realized good yields. Unless 1946 acreage is cut at least 10 percent below 1945, marketing difficulties may be encountered.

Celery

During 1945 no serious marketing difficulties were encountered and prices were relatively high. The 1945 acreage was 45,360 acres; 4,000 acres more than that of 1944, and 6,000 acres above average. Yields per acre in 1945 was 353 crates, which approximates the 10 year average. If acreage is maintained at the present level, no serious marketing difficulties are foreseen.

Sweet Corn

In 1945, growers in New Jersey, New York and Pennsylvania planted 54,000 acres of sweet corn for fresh market. This is about equal to the 1944 acreage, but about 10 percent above the 10 year (1934-43) average. Yields per acre in 1945 were higher than in 1944, resulting in a total production 16 percent greater than in 1944 and 10 percent above average. Prices received by growers in 1945 were higher than in 1943 and 1944. In view of the prospective good demand production from an acreage equal to 1945 would probably encounter no serious marketing difficulties.

Cucumbers

Spring: Spring acreage of cucumbers in 1945 was 12 percent greater than in 1944 but about 8 percent less than the 10 year (1934-43) average. Production in 1945 was 20 percent greater than in 1944 and about average. The average price to growers for the spring crop was \$2.52 per bushel, 13 cents more than in 1944 and \$1.13 above average. No change in acreage in 1946 is suggested.

Summer: Summer acreage in 1945 was 5 percent greater than in 1944 and 7 percent above average. Yields per acre in 1945 were 3 percent less than in 1944, resulting in a production about equal to 1944 but slightly above average. Prices to growers in 1945 were slightly higher than in 1944 and were double the 10 year average. For 1946 no change in acreage from 1945 is suggested.

Fall: The fall acreage in 1945 was estimated to be 36 percent greater than in 1944 and 42 percent above average, but yields are below average. Prices to growers in 1945 have been high. In view of prospective good demand an acreage equal to 1945 seems desirable.

Eggplant

Winter: The 1945 winter production of eggplant was 298,000 bushels, about 20 percent less than the record 1944 crop. Prices to growers averaged \$2.30 per bushel, which was 24 percent higher than the price in 1944, when 50,000 bushels were not harvested because of unsatisfactory markets. As indicated in the "1946 Production Statement for Winter Vegetables", an acreage in 1946 equal to the 850 acres planted in 1945, should produce a crop sufficient to supply amply the consumer demand.

Spring: In 1945, growers planted 1,400 acres, which equalled the 1933 record acreage and which was about 17 percent larger than the 1944 acreage. This large acreage, with below-average yields, produced a crop of 406,000 bushels, which was slightly above the 1944 crop. The average price of \$1.95 per bushel in 1945 was 40 cents higher than in the preceding year. Assuming average yields a 1946 acreage about 20 percent less than that of 1945 seems necessary to avoid marketing difficulties.

Summer: The 1945 acreage of 2,150 acres was the same as in 1944 but was about 17 percent above average. Below-average yields of 190 bushels per acre in 1945 resulted in a production of 408,000 bushels or somewhat less than the 444,000 bushels produced in 1944. The average price to growers of \$1.87 per bushel in 1945 was more than double the average price of the preceding season. If average yields are obtained a 10 percent reduction from the 1945 planted acreage seems desirable.

Fall: The record 1945 fall acreage of 2,000 acres, with yields considerably above average was estimated to produce 332,000 bushels, or 155,000 bushels more than in 1944. For 1946 an acreage about 25 percent less than that of 1945 is suggested.

Escarole

Winter: The acreage during the 1945 winter season was slightly less than in 1944, but more than double the 1934-43 average. Production in 1945 was about 8 percent less than in 1944. In each of the past two years, a substantial tonnage was not marketed because of poor quality. Prices received by growers in 1945 averaged \$2.10 per hamper, which was considerably above the \$1.15 average in 1944. As suggested in the "1946 Production Statement for Winter Vegetables" an acreage at least 10 percent less than the 2,300 acres harvested in 1945 seems desirable.

Garlic

Acreage of garlic has decreased over the past several years, the 10 year (1934-43) average acreage being 3,970 acres; and the 1945 acreage, 3,850 acres. Production has been maintained at about 150,000 sacks per year. No change in acreage of garlic for fresh use above 1945 appears necessary in 1946.

Kale

Winter: The 1945 Virginia kale crop totaled 600,000 bushels, which was 27 percent less than the 1944 production. The 1945 harvested acreage of 1,600 acres, although considerably below the 2,350 acres grown in 1944, was but slightly below the 10 year (1934-43) average. The 1945 average price of 65 cents per bushel approximated the 1944 price. Government surplus purchases took about 5 percent of the 1945 crop. As pointed out in the "1946 Production Statement for Winter Vegetables", an acreage equal to the 1,600 acres harvested in 1945, with average yields, should provide adequate supplies.

Lettuce

Winter: Acreage of winter lettuce during the past 4 years (1942-45) has remained at approximately prewar levels. Production has increased due to higher yields per acre which averaged 162 crates per acre in 1945, 36 crates above the 10 year average. During 1945, the 6,422,000 crates marketed, returned an average price of \$2.75 per crate to growers. For the 1946 winter crop, an acreage about equal to the 1945 acreage is suggested.

Spring: The acreage of spring lettuce in 1945 was about 10 percent larger than that of 1944 and about 20 percent larger than the 10 year (1932-41) average. Yields per acre were greater than average but slightly smaller than in 1944. In 1945 production was 7 percent greater than in 1944. The 9,770,000 crates produced in 1945 were marketed by growers without difficulty at prices which averaged higher than for any season except 1943. For 1946, the same acreage as that planted in 1945 seems desirable.

Summer: The lettuce acreage of 29,600 acres in 1945 was about 3 percent smaller than that of 1944, and the average. Yields per acre, however, were substantially greater than average with the result that production in 1945 was almost 50 percent greater than average and equal to that of 1944. In 1945, prices to growers averaged \$3.20 per crate, which was the second highest average on record. An increase of approximately 8 percent in acreage over 1945 with average yields will result in production equivalent to 1945 and no serious difficulties should be encountered in marketing.

Fall: Fall acreage in 1945 was slightly greater than in 1944, and 20 percent more than average. Yields in 1945 of 169 crates per acre were substantially larger than in 1944 and the average prices to growers reached a record high in 1944 at \$2.72 per crate. It is expected that the production from an acreage in 1946 equal to 1945 can be marketed without serious difficulty.

Onions

Onion acreage decreased somewhat in 1945 from the large plantings of 1944. With less demand for dehydrated onions, reductions in acreage must be made in order to avert difficulties in marketing the 1946 crop.

Spring: Early spring plantings in Texas for 1946 are now indicated to be 56,600 acres, approximately 8,000 acres less than in 1945 and 14,000 acres less than in 1944. Yields per acre in Texas in 1945 averaged 64 bags (50 lbs.), approximately 5 percent below average. In order to avoid marketing difficulties in 1945 it seems desirable to reduce acreage about 10 percent. As a large early spring crop may depress prices for the late spring crop, no increase in acreage for the late spring crop is recommended.

Summer: A total early summer acreage equivalent to 1945 is suggested for 1946. Due to unfavorable weather conditions in 1945, the late summer production in the Eastern and Central States was reduced. Acreage in the Western Area was nearly double the 10 year average. In 1946, a much smaller demand for onions for dehydration is anticipated. An acreage increase of

15 percent in the Eastern Area, 30 percent increase in the Central Area, and a decrease of at least 25 percent in the Western acreage of Spanish type onions are necessary adjustments for 1946 to meet peacetime marketing conditions.

Green Peas

Acreage and production of green peas for the fresh market have declined due to increasing competition from frozen peas, and to the fact that the relatively large amount of hand labor required was not available. Acreage in 1945 was approximately 8 percent smaller than in 1944, 28 percent less than the 10 year (1934-43) average, and except for 1943, the smallest acreage since 1929. It is expected that competition from the 1945 canned and frozen packs, each of which was the largest on record, will materially affect the market for fresh peas during 1946.

Winter: Acreage in 1945 has declined in proportion to the year to year decrease, while production has declined at an even more rapid rate, due to below average yields for the last 3 years. Prices to growers have been less favorable than prices for some competing crops. During the 1944-45 winter season, 404 cars were imported from Mexico. This was about one-half of the 1943-44 imports. Present indications are that competition from this source will not be appreciably greater in 1946. It appears advisable to keep winter acreage at the 1945 level.

Spring: Acreage of spring peas has declined even more markedly than for the winter crop. The 1945 acreage, while slightly larger than either 1943 or 1944, was less than two-thirds of average. Prices in 1945 were higher than 1944, in spite of an 18 percent gain in total production. In 1945, gross returns per acre averaged approximately one-third greater than in 1944. A 1946 acreage 15 percent larger than in 1945 would result in a production 12 percent smaller than in 1945. This amount should be sufficient, considering the large amounts of both canned and frozen peas available to civilians from the 1945 pack.

Summer: Acreage of summer peas has declined less rapidly than for any other season; acreage in 1945 was 15 percent smaller than in 1944 but only 4 percent below average. Price to growers in 1945 was relatively high. Acreage approximately equal to 1945 appears desirable for 1946.

Fall: Early fall acreage in 1945 was 8 percent less than in 1944 but only 53 percent of average. Because of good yields production in 1945 was increased over 1944. Prices held at high levels during 1944 and 1945. For 1946 an increase in acreage of 5 percent seems justified.

Green Peppers

Winter: The acreage planted to winter peppers in 1944 and 1945 exceeded the 10 year (1934-43) average by over 50 percent. Production in 1945 was approximately 57 percent more than average. Prices to growers in 1945 averaged \$2.40 per bushel; 40 cents more than in 1944. Because of good demand an acreage equal to that of 1945 seems desirable.

Spring: The spring acreage in 1945 was 30 percent greater than 1944 and nearly 60 percent greater than average. Indicated production in 1945 was 35 percent greater than the production in 1944, and 28 percent larger than average. The average price of \$2.50 per bushel was 25 cents more than that of 1944 and nearly double the average. Because of good demand an acreage equal to that of 1945 seems desirable.

Summer: In 1945, the acreage was 5 percent larger than in 1944 and 40 percent larger than average. With above-average yields, the production was 44 percent larger than in 1944, and nearly 50 percent larger than average. Late summer acreage in 1945 of green peppers was about equal to 1944 and 18 percent greater than average. Yields of 226 bushels per acre were slightly better than average; total production was 14 percent larger than in 1944 and 8 percent larger than average. The average price per bushel in 1945 of \$1.99 to growers was 60 cents higher in 1944 and \$1.29 per bushel above average. The production from an acreage in 1946 about equal to that in 1945 could probably be marketed satisfactorily.

Fall: Fall acreage in 1945 was 50 percent larger than in 1944 and 28 percent larger than average. Production in 1945 was 70 percent greater than in 1944, and 49 percent greater than average. It appears that an acreage in 1946 equal to or slightly less than 1945 would be desirable.

Shallots

Winter: In 1945, production was about 125 percent greater than in 1944, because of expanded acreage and record high yields, and about 25 percent greater than the 1937-43 average. Prices to growers averaged about \$1.35 per bushel (\$7.40 per barrel), 18 percent less than in 1944 but more than double the 1937-43 average. The production guide statement for winter vegetables suggested that growers probably should not increase their winter acreage for 1946.

Spring: Acreage in 1945 was about 5 percent greater than in 1944 but was 7 percent below average. Yield per acre was considerably higher than in 1944, although somewhat below average. Consequently, 1945 spring production was about 38 percent greater than that of 1944 but 18 percent below average. The average price received by growers of \$1.40 per bushel (\$5.60 per barrel) was 44 percent below the 1937-43 average of \$2.50 per bushel for the short 1944 crop, but 57 percent above the 1937-43 average of \$0.89 per bushel. It appears that an acreage equal to that of 1945 should provide ample market supplies.

Spinach

During the war about half of the commercially grown spinach was canned or frozen. Processors usually adjust their packs, in accordance with existing or expected market conditions. Sudden changes in plans for processing result in wide variations of the supply available for the fresh market.

Winter: Over 60 percent of total acreage and over half of the total production for the fresh market is harvested in the winter months. Texas accounts for well over half of the total acreage. Prices to growers of the 1945 winter crop averaged higher than in 1944 although production was almost the same in the two years; Texas had unusually good 1945 yields on reduced acreage. The production guide for 1946 plantings advised holding down winter acreage to no more than the 1945 figure. The close of the war with decreased government requirements for canned and frozen spinach, and probable lowered consumer purchasing power, make it desirable that acreage be reduced 10 percent wherever possible.

Spring: Production for the fresh market in 1945 was 14 percent less than in 1944 and 5 percent below the 1934-43 average. Prices to growers were substantially above 1944 spring crop prices. A 1946 acreage 10 percent smaller than 1945 is suggested because of a reduction in demand for processing.

Summer: Acreage in 1945 was about the same as in 1944, but production in 1945 in leading commercial areas was 34 percent larger. In spite of the larger supply, growers received higher prices in 1945. It appears that production from an acreage equal to 1945 could be marketed in 1946 at prices somewhat lower than those received in 1945.

Fall: In 1945 good yields on an acreage 35 percent larger than 1944 resulted in the largest early fall production on record, a production almost double that of 1944. Prices to growers have been considerably lower than in 1944. A 1946 early fall acreage 10 percent smaller than 1945 is suggested in order to avert low prices in 1946.

Tomatoes

The 1945 production of tomatoes for fresh market established a new record and will amount to 31 million bushels or about 4 million bushels more than in 1944 and 8 million bushels above the 10 year average. In addition to this domestic supply, Mexican imports established a new record. In spite of heavy supplies, the market has been generally satisfactory because of a good demand.

Winter: Production of winter tomatoes in 1945 was 2,550,000 bushels; approximately 45 percent more than the 10 year (1934-43) average and 20 percent larger than the 1944 production. Imports from Cuba were limited in 1945 due to the lack of ships but the imports from Mexico set a record, amounting to 7,975 carloads for the season (about 3,000,000 bushels).

Prices to growers held at high levels, averaging \$4.90 per bushel in 1945; \$5.95 in 1944, and \$6.15 in 1943. Present indications are that the Mexican 1945-46 tomato acreage will be about the same as in 1944-45. Yields per acre during 1945 in Mexico were well above average. However, shipments in 1945 were somewhat reduced because of a shortage of refrigerator cars. It is expected that imports from Mexico will not exceed those in 1944. More cargo space will be available to move the Cuban crop this winter. Plantings are late, however, due to the lack of assurance of shipping, but imports from Cuba will probably exceed 1944-45 by 50 percent. An increase of 5 percent in the Florida winter acreage is suggested and should result in about the same production as in 1944-45.

Early Spring: Early spring production of tomatoes has increased sharply during the war, due almost entirely to increased plantings in the Lower Valley of Texas. Production in 1945 was 122 percent more than average. Early spring acreage in Florida has dropped from a 10 year average of 15,340 to about 11,000 acres in 1944 and 1945, whereas acreage in California has increased from a 10 year average of 4,060 to 5,000 acres in 1945. The tomato acreage in 1945 in Lower Valley of Texas increased approximately 300 percent above average and was 41 percent more than the 1944 acreage. Production in the Lower Valley in 1945 was 4,875,000 bushels or approximately 3,700,000 bushels above average and 900,000 bushels above 1944. Prices to growers in the early spring states averaged \$3.42 per bushel. The average price to growers in the Lower Valley of Texas, however, was only \$2.15 per bushel. In order to avert very serious marketing difficulties in early spring 1946, growers in Texas should reduce acreage at least 30 percent. It should be pointed out that in the event of a surplus of green wrapped tomatoes, government assistance would necessarily be limited because of the nature of the commodity.

Late Spring: The late spring 1945 production was 3,752,000 bushels, 110,000 bushels above average and 700,000 bushels above 1944. Production in Texas other than the Lower Valley in 1945 was 2,754,000 bushels; an increase of about 37 percent over 1944 and 28 percent above average. In Louisiana, Mississippi, and Georgia, there was a decrease in 1945 acreage from both 1944 and the 10 year average. A small increase in the 1945 acreage occurred in South Carolina. However, the average price to growers in South Carolina was higher than in any of the late spring states. An acreage in 1946 equal to that of 1945 should be sufficient.

Early Summer: In 1945 a production of 4,752,000 bushels was only slightly more than the 1944 production and the 10 year average. Acreage has held steady at around 35,000 acres. The demand has been good, and prices well above average. An acreage in 1946 equal to harvested acreage in 1945 would appear to be adequate.

Late Summer: The late summer production of 8,829,000 bushels in 1945 is somewhat less than average and the 1944 production. Acreage in 1945 was about the same as 1944 and approximately 10 percent more than average. Yields in 1944 were slightly higher but slightly lower than average. The demand has been good with prices generally satisfactory. The same acreage in 1946 as planted in 1945 should be sufficient.

Early Fall: The early fall acreage in 1945 increased 34 percent above average. Practically all this increase has been in the northern district of California. Yields in 1945 were above average and the production was 50 percent larger than the 10 year average of 2,209,000 bushels. Demand has been good and prices generally satisfactory on this increased production. It appears that production from an acreage in 1946 equal to that of 1945 could be marketed.

Late Fall: Late fall acreage in 1945 was almost 50 percent larger than average and 67 percent more than the 1944 acreage. The 1945 production was approximately 376,000 bushels above average and 350,000 bushels above that of 1944. In 1946 ample cargo space should be available and imports from Cuba will probably return to prewar levels. Imports will be received from Mexico during this season. In view of the conditions outlined above growers should consider the advisability of the reduction of acreage in 1946, possibly by as much as 15 percent.

Watermelons

The past three seasons have been among the most successful in the history of the watermelon industry from the standpoint of the growers point of view. Acreage in 1943 dropped to one of the lowest levels in many years, then by 1945 increased to approximately prewar levels. In 1945 production was 5 percent larger than in 1944 and 12 percent more than the 10 year average. Prices to growers in 1945 averaged higher than in 1944 but lower than 1943, and more than three times average.

Late Spring: Florida and the Imperial Valley of California are the two areas included in the late spring group. Imperial Valley acreage has been declining for several years, and in 1945 dropped to 4,000 acres; only two-thirds of 1944 and less than two-thirds of the 10 year average. A combination of good yields and high prices during 1945, may encourage growers to increase 1946 plantings. It would appear that production from an Imperial Valley acreage 15 percent greater than in 1945 could be marketed in the western states, the usual market outlets for these melons.

In 1945 the Florida acreage of 36,000 was the largest since 1929, and was 40 percent higher than in 1944 and over 70 percent above average. Sizes and yields were reduced by drought in the latter part of the season but prices realized by most growers were high. In Florida production from an acreage equal to that in 1945 will probably be marketed in 1946 at prices less than 1945.

Summer: Production in the early summer group of states was 6 percent larger than in 1944, and 14 percent larger than average. Production in 1945 in the late summer areas was 10 percent less than in 1944 and 12 percent smaller than average. The larger and better melons sold at high prices during most of the early summer marketing period but prices were reduced somewhat for most of the late crop. A 1946 acreage equal to that harvested in 1945 in both the early and late summer groups appears ample to meet the demand.

PROCESSED VEGETABLESAsparagus

Acreage in 1945 of asparagus for both processing and the fresh market was only 5 percent larger than the 10 year (1934-43) average. The downward trend in California and the Southeast has been a little more than balanced by gains in the Pacific Northwest, the Middle West and East Central States. The estimated canned pack in 1945 is about 50 percent larger than, and the frozen pack between 150 to 200 percent larger than the five-year (1937-41) average. Processing has absorbed most of the increased production of the expanding areas, and has made inroads on California production for the fresh market.

More than half of the 1945 crop was used for canning and freezing. In 1945 canners and freezers on the Pacific Coast competed strongly with both the fresh market and each other for supplies; in many cases growers received prices above the designated prices. Reports of intended 1946 acreage indicate a 2 percent reduction in California as compared with 1945, with Washington acreage maintained at the 1945 level. Slight increases are expected in midwestern and East Central areas. Reductions in 1946 government purchases for both canned and frozen asparagus may lessen competition, although the fresh market should have little difficulty in absorbing all asparagus on the Pacific Coast not wanted by processors. In other areas, average yields on the intended acreage should provide ample supplies for all uses.

Lima Beans

Production of lima beans for processing increased rapidly during the last few years. Acreage planted in 1945 totaled 71,100, the largest on record and an increase of 8 percent over 1944, and 32 percent larger than the 1937-41 average. Civilian demand, particularly for frozen limas, has increased and the total 1946 demand for limas is expected to exceed 1945 production in spite of cut-backs in military requirements. Prices designated by the government in 1945 range from \$95.00 to \$128.00 a ton to growers in different sections of the country. This compares with an average 1944 price received by growers of \$121.38, and a 5 year (1937-41) average of \$67.26 a ton. An acreage about equal to that of 1945 appears to be desirable, with some expansion in quality production in areas where processing outlets are available.

Snap Beans

The 157,400 acres of snap beans grown in 1945 for commercial canning and freezing have been exceeded only by the record-high 161,370 acres in 1943. The 1934-43 average was only 78,150 acres. The estimated 245,800 tons of snap beans for processing produced in 1945 is second high on record, and is about 88 percent larger than average.

The most rapid increases in acreage and production have occurred in Virginia, North and South Carolina and Oklahoma, but states leading in total production are New York, Oregon, Arkansas, Maryland, Wisconsin, Florida and Texas. Acreage and production have expanded during the war far beyond the immediate postwar needs.

During most of the war years National average yields per acre dropped considerably, because of the addition of less suitable land and less experienced growers to the production pattern. As acreages are readjusted to normal peacetime needs, it is expected that marginal producers will withdraw from production and average yields per acre may

continue the upward trend interrupted by the wartime expansion. Assuming average yield in 1946, adequate production could be obtained with commercial acreage approximately 25 percent smaller than in 1945.

Beets

Acreage of beets for processing reached an all-time high in 1945 with 20,000 acres estimated to produce 140,800 tons. The 10 year (1934-43) average acreage was 12,000 acres and average production 78,800 tons. In 1945, unfavorable harvesting conditions and the development of an export outlet to Canada largely offset effects of cancellation of dehydration contracts, and large acreage. The price was lower than in 1944. In 1946 a reduction of 25 to 30 percent in acreage for processing seems necessary in order to avert serious marketing difficulties.

Cabbage for Kraut

In 1945 the planted acreage of cabbage for kraut was about equal to the 10 year (1934-43) average. With above average yields, production in 1945 was estimated at 210,700 tons; considerably above the 1944 production of 117,100 tons and an average of 162,100 tons. With unlimited tin available to kraut packers in 1946, an acreage equal to 1945 would seem sufficient to meet processors demands. It should be pointed out, however, that cabbage grown for fresh market might in the event of a surplus crop, enter into competition with open market cabbage grown for processing.

Carrots

Production of carrots for all purposes (fresh market, canning and dehydration) in 1945 nearly equaled the 1943 record and was almost double the 1933-42 average. Increased government requirements for canned and dehydrated carrots during the war has been only in part responsible, the increase being due principally to greater consumer demand for fresh carrots. The average canned pack during the war years was more than double the prewar (1937-41) average, but it is expected that not more than 10 percent of the 1945 crop will go for this purpose. Dehydration took about 6 percent of the 1944 crop, and a negligible part of the 1945 crop.

Because of greatly reduced demands for carrots for processing in 1946 growers would do well to plant only as much acreage for processing as they can contract before planting. Without such contracts, they should bear in mind that the 1946 demand for fresh carrots will probably be able to absorb considerably smaller supplies than in 1945 at satisfactory prices.

Sweet Corn

The 1945 indicated planting of 524,560 acres of sweet corn for processing is 27 percent above the 10 year (1934-43) average of 412,960 acres. Production of 1,281,700 tons indicated for 1945 exceeds 1944 production by 27 percent, and the average by about 46 percent. The 1942 record high production was only 800 tons more than the indicated 1945 production. The 1944 pack of sweet corn totaled 25.4 million cases, 3.5 million cases above 1943. It is estimated that approximately 31 million cases will be packed in 1945. This exceeds the 5 year (1937-41) average pack of 20 million cases by 45 percent. Cold storage holdings of frozen corn on October 1, 1945 totaled 16,543,000 pounds, an increase of 9 percent over October 1, 1944, and 52 percent over the 5 year (1940-44) average.

The support price to growers in 1945 ranged from \$17 to \$28 per ton. These prices compare with the 10 year (1933-42) average of \$9.70 per ton to growers. Demands for sweet corn for processing in 1946 are estimated to be 10 percent less than the 1945 production of 1,281,700 tons. An acreage 2 percent below 1945 should be sufficient.

Cucumbers for Pickles

In 1945 the 115,200 acres planted to cucumbers for pickles exceeded the 1944 acreage by about 7 percent and the 10 year (1934-43) average by 15 percent. Prices paid to growers in 1944 for cucumbers for pickling averaged \$1.09 per bushel higher than the 94 cents per bushel in 1943, and double the 10 year (1933-42) average. An acreage 10 percent below 1945, assuming average yields, should meet 1946 processing needs.

Green Peas

The largest pea pack on record has been made in 1945. The 500,300 acres planted for the 1945 season was about 3 percent above the previous record-high acreage in 1943, 7 percent more than 1944, and 40 percent over the 10 year (1934-43) average planted acreage. Production estimates for 1945 place the crop at 484,000 tons, at a yield of 2,127 pounds per acre, the highest yield in more than two decades. The resulting tonnage is about 14 percent above the previous record-high 1942 tonnage, 27 percent more than 1944, and about 70 percent above average. Prices in 1945 are estimated at \$3.62 per ton for the country as a whole. This is slightly more than 1944 and \$28.92 above average. While military and other government agencies have reduced their requirements in 1945, their purchases in 1946 are expected to be substantial. A reduction of 8 percent from the 1945 planted acreage should, with average yields, supply adequate quantities of green peas for processing.

Pumpkin and Squash

The 1945 pack of canned pumpkin and squash is estimated at 3,000,000 cases (basis 24/No. 2 cans), slightly larger than the 1944 pack and 15 percent greater than the 1937-41 average. The 1945 pack of frozen squash and pumpkin is estimated at 10 million pounds; an increase of 12 percent over 1944 and more than 10 times the 1937-41 average. A 1946 acreage and pack approximately the same size as in 1945 would be sufficient.

Spinach

Production of spinach for processing reached an all-time record in 1942 but has approached that figure in the 3 subsequent seasons. The 1944 canned pack was nearly double, and the 1944 frozen pack more than 8 times as large as the prewar average (1937-41). Processors adjust the size of their pack, according to present or expected market conditions. At present about half of all spinach grown is used by processors, and any large reduction in processing demands may result in considerable amounts being thrown on the fresh market. The rapid expansion in production of spinach for processing during the war years, heavy reductions in government requirements for both canned and frozen spinach, together with lowered consumer purchasing power, indicate that 10 percent less spinach should be planted for processing in 1946.

Tomatoes

Tomatoes

The planted acreage of tomatoes during the war years (1942-45) averaged approximately 584,000 acres, nearly 130 percent of the prewar average acreage (1935-39). The present outlook and prospective demand would indicate as desirable a 1946 production of about 3 million tons. This would, on the basis of a 10-year (1934-43) average yield, require an acreage approximately comparable to the 1945 goal of 626,640 acres.

Proposed Price Support: The Department of Agriculture will extend marketing assistance to fresh vegetable growers to the extent possible through (1) encouragement of movement through normal trade channels, (2) encouragement of diversion of surplus fresh vegetables to processing channels, and (3) purchase of surplus fresh vegetables for distribution through school lunch and relief outlets in fresh or processed form. In extending such marketing assistance, special attention will be given to whether excess supplies are due to above-average yields or to other causes. No support prices will be designated for 1946 crop vegetables grown for fresh market.

Any purchases that may be made to relieve surpluses will necessarily be limited in quantity to the volume of available outlets. Furthermore, purchases will be confined to those vegetables, qualities, and grades, which are suitable for distribution.

1946 Goals -- Vegetables -- Page 18

Commercial truck crops for fresh market
Suggested production and acreage, 1946 with comparisons

Season :	1946 production guide :	Average : acreage :	Indicated : acreage :	Suggested 1946 acreage : as a percent of	Average 1934-43 : acreage :	Indicated 1945 : acreage :
:	Production :	Acreage :	1934-43 :	1945 :	Average 1934-43 : acreage :	Indicated 1945 : acreage :
:	:	:	:	:	:	:
:	1,000 :	1,000 :	1,000 :	1,000 :	Percent :	Percent :
	(Crates)		<u>Asparagus</u>			
Spring :	12,354.4 :	125.9 :	77.1 :	85.3 :	163.3 :	147.6 :
	(Bushels)		<u>Beans, Lima</u>			
Winter :	132.0 :	2.2 :	1.8 :	2.0 :	122.2 :	110.0 :
Spring :	430.1 :	7.7 :	7.7 :	6.4 :	100.0 :	120.3 :
Summer :	765.5 :	10.3 :	9.4 :	8.6 :	109.6 :	119.8 :
Fall :	61.4 :	1.0 :	1.8 :	1.8 :	125.0 :	125.0 :
Total:	1,389.0 :	21.2 :	19.7 :	17.8 :	107.6 :	119.1 :
	(Bushels)		<u>Beans, Snap</u>			
Winter :	2,800.8 :	35.0 :	25.6 :	35.0 :	136.7 :	100.0 :
Spring :	3,890.0 :	51.0 :	69.8 :	46.8 :	73.1 :	109.0 :
Summer :	4,979.2 :	45.7 :	33.7 :	43.9 :	135.6 :	104.1 :
Fall :	3,890.0 :	39.3 :	40.8 :	41.1 :	96.3 :	95.6 :
Total:	15,560.0 :	171.0 :	169.9 :	166.8 :	100.6 :	102.5 :
	(Bushels)		<u>Beets</u>			
Winter :	940.7 :	7.0 :	6.9 :	7.8 :	101.4 :	89.7 :
Spring :	277.4 :	1.4 :	2.3 :	1.4 :	60.9 :	100.0 :
Summer :	868.0 :	2.8 :	2.6 :	2.8 :	107.7 :	100.0 :
Total:	2,086.1 :	11.2 :	11.8 :	12.0 :	94.9 :	93.3 :
	(Tons)		<u>Cabbage</u>			
Winter :	349.8 :	63.8 :	48.1 :	67.2 :	132.6 :	94.9 :
Spring :	142.4 :	28.7 :	28.1 :	30.2 :	102.1 :	95.0 :
Summer :	186.9 :	27.5 :	30.7 :	27.5 :	89.6 :	100.0 :
Fall :	546.8 :	63.7 :	55.3 :	79.6 :	115.2 :	80.0 :
Total:	1,225.9 :	183.7 :	162.2 :	204.5 :	113.3 :	89.8 :
	(Crates (65 lbs.))		<u>Cantaloups</u>			
Spring :	2,405.7 :	17.8 :	13.2 :	16.2 :	97.8 :	109.9 :
Summer :	9,714.6 :	92.5 :	83.1 :	92.5 :	111.3 :	100.0 :
Total:	12,120.3 :	110.3 :	101.3 :	108.7 :	108.9 :	101.5 :

1946 Goals -- Vegetables -- Page 19

Commercial truck crops for fresh market
Suggested production and acreage, 1946 with comparisons

Season	1946 Production guide Production : Acreage	Average acreage : 1934-43	Indicated acreage : 1945	Suggested 1946 acreage Percent of Average 1934-43 acreage : 1945 acreage
	1,000 : 1,000	1,000	1,000	Percent : Percent
	(crates (65 lbs))	<u>Honeyball melons</u>		
Spring	242.4 : 1.8	2.6	1.5	69.2 : 120.0
	(crates (35 lbs))	<u>Honeydew melons</u>		
Spring	836.9 : 3.8	4.3	3.2	88.4 : 118.8
Summer	3,532.1 : 14.3	7.2	14.3	198.6 : 100.0
Total	4,369.0 : 18.1	11.5	17.5	157.4 : 103.4
	(Bushels)	<u>Carrots</u>		
Winter	6,920.7 : 30.1	21.0	35.4	143.3 : 85.0
Spring	4,186.8 : 10.9	8.5	12.8	128.2 : 85.2
Summer	2,371.8 : 6.7	5.7	6.7	117.5 : 100.0
Fall	8,909.2 : 22.5	18.4	32.1	122.3 : 70.1
Total	22,390.5 : 70.2	53.6	87.0	131.0 : 80.7
	(crates)	<u>Celery</u>		
Winter	5,202.0 : 9.0	6.6	9.0	136.4 : 100.0
Spring	3,182.0 : 6.0	3.9	6.0	153.8 : 100.0
Summer	2,119.0 : 5.3	5.4	5.3	98.1 : 100.0
Fall	8,163.0 : 25.4	23.2	25.4	109.5 : 100.0
Total	18,666.0 : 45.7	39.1	45.7	116.9 : 100.0
	(ears)	<u>Corn, sweet</u>		
Summer	270,000.0 : 54.0	48.7	54.0	110.9 : 100.0
	(bushels)	<u>Cucumbers</u>		
Spring	2,302.4 : 25.0	25.7	25.0	97.3 : 100.0
Summer	2,132.0 : 16.4	15.2	16.4	107.9 : 100.0
Fall	362.6 : 4.9	3.5	4.9	140.0 : 100.0
Total	4,797.0 : 46.3	44.4	46.3	104.3 : 100.0
	(crates)	<u>Lettuce</u>		
Winter	6,422.0 : 39.5	36.2	39.5	109.1 : 100.0
Spring	9,770.0 : 62.4	53.5	62.4	116.6 : 100.0
Summer	5,754.2 : 32.0	29.8	29.6	107.4 : 108.1
Fall	6,252.0 : 41.7	32.5	41.7	124.5 : 100.0
Total	28,198.2 : 175.6	153.0	173.2	114.8 : 101.4
	(sacks (50 lbs))	<u>Onions</u>		
Spring	5,689.6 : 68.0	65.2	68.5	104.3 : 99.3
Summer	29,574.2 : 72.7	65.1	71.5	111.7 : 101.7
Total	35,263.8 : 140.7	130.3	140.0	108.0 : 100.5
	(Bushels)	<u>Peas, green</u>		
Winter	799.2 : 11.1	14.4	11.1	77.1 : 100.0
Spring	2,901.7 : 35.0	47.8	30.4	73.2 : 115.1
Summer	1,943.0 : 19.4	20.2	19.4	96.0 : 100.0
Fall	805.6 : 8.7	13.4	8.2	64.9 : 106.1
Total	6,449.5 : 74.2	95.8	69.1	77.5 : 107.4

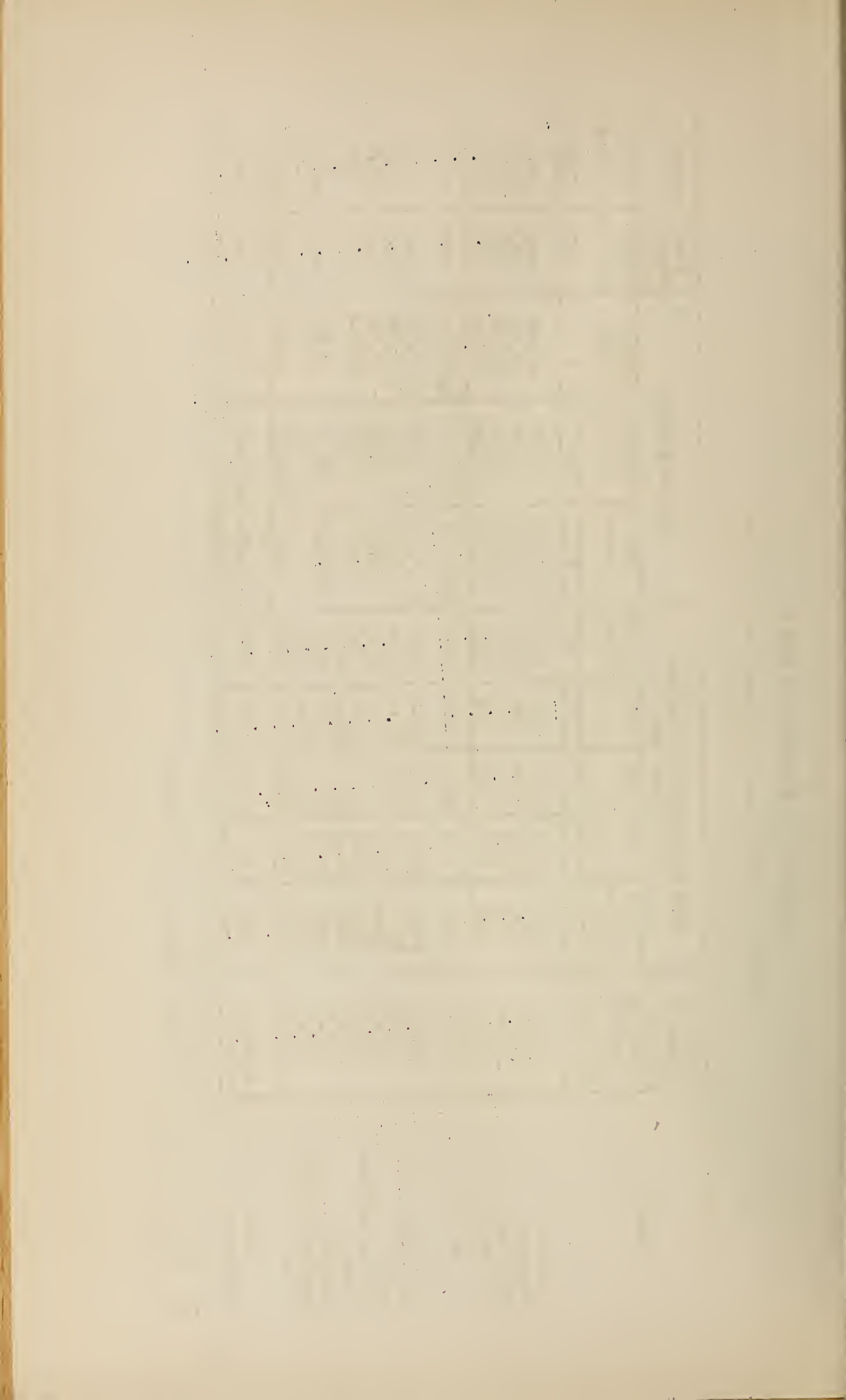
Commercial truck crops for fresh market
Suggested production and acreage, 1946 with comparisons

Season	1946 Production guide	Average	Indicated	Suggested 1946 acreage		
	Production; Acreage	acreage	acreage	as a percent of		
		1934-43	1945	Average 1934-43 acreage	Indicated 1945 acreage	
	1,000	1,000	1,000	1,000	Percent	Percent
	(Bushels)		Peppers, green			
Winter	: 810.0	: 3.2	: 2.1	: 3.2	: 152.4	: 100.0
Spring	: 1,191.4	: 4.6	: 2.9	: 4.6	: 158.6	: 100.0
Summer	: 3,218.6	: 15.4	: 12.6	: 15.4	: 122.2	: 100.0
Fall	: 880.0	: 5.0	: 3.9	: 5.0	: 128.2	: 100.0
Total	: 6,100.0	: 28.2	: 21.5	: 28.2	: 131.2	: 100.0
	(Bushels)		Spinach			
Winter	: 6,140.3	: 37.0	: 43.3	: 41.1	: 85.5	: 90.0
Spring	: 2,506.5	: 8.7	: 10.6	: 9.7	: 82.1	: 89.7
Summer	: 1,782.0	: 5.4	: 4.6	: 5.4	: 117.4	: 100.0
Fall	: 2,257.9	: 8.8	: 9.9	: 9.8	: 88.9	: 89.8
Total	: 12,686.7	: 59.9	: 68.4	: 66.0	: 87.6	: 90.8
	(Bushels)		Tomatoes			
Winter	: 2,481.2	: 17.8	: 12.6	: 17.0	: 141.3	: 104.7
Spring	: 8,019.3	: 110.7	: 84.5	: 130.2	: 131.0	: 85.0
Summer	: 13,585.5	: 89.3	: 83.7	: 89.3	: 106.7	: 100.0
Fall	: 3,888.9	: 31.7	: 24.3	: 28.8	: 130.5	: 110.1
Total	: 27,974.9	: 249.5	: 205.1	: 265.3	: 121.6	: 94.0
	(melons)		Watermelons			
Spring	: 14,372.4	: 40.6	: 26.9	: 40.0	: 150.9	: 101.5
Summer	: 57,032.2	: 217.7	: 218.0	: 217.7	: 99.9	: 100.0
Total	: 71,404.6	: 258.3	: 244.9	: 257.7	: 105.5	: 100.2
	(pounds)		Total			
Winter	: 1,832,659.4	: 255.7	: 218.5	: 268.3	: 117.0	: 95.3
Spring	: 3,111,892.7	: 610.0	: 539.6	: 580.6	: 113.0	: 105.1
Summer	: 5,943,338.0	: 727.4	: 675.7	: 720.3	: 107.7	: 101.0
Fall	: 2,368,381.5	: 252.7	: 227.0	: 277.4	: 111.3	: 91.1
Total	: 13,256,271.6	: 1,845.8	: 1,660.9	: 1,846.6	: 111.1	: 99.9

Vegetables for Processing: Suggested Goals for 1946

Commodity	Estimated 1946 Requirements (mil. lb. farm wt.)	1946 requirements as a percent of the pack for					Planted Acreage			1944 suggested acreage as a % of the planted acreage for	
		1945 indicated	1944	1943	1942	1937-41 average	1946 suggested	1945 indicated	1937-41 average	1945 indicated	1937-41 average
			3	4	5	6	7	8	9	10	11
1		2									
Tomatoes	6,053.3	105.9	95.5	113.7	95.6	140.8	626,640	600,900	429,484	104.3	145.9
Sweetcorn	2,327.9	90.8	115.3	99.4	90.8	132.6	510,504	524,560	373,786	97.3	136.6
Green peas	741.6	76.6	97.6	91.1	87.5	130.5	460,800	500,300	334,674	92.1	137.7
Snap beans	394.3	80.2	87.0	75.2	84.4	167.6	118,050	157,400	72,220	75.0	163.5
Subtotal	9,517.1	97.7	99.4	105.7	93.2	138.8	1,715,994	1,783,160	1,210,164	96.2	141.8
Asparagus	226.9	100.0	110.2	120.2	118.1	166.7	a/ 41,846	b/ 42,700	a/ 45,982	98.0	91.0
Beans, lima	82.0	105.1	135.5	149.9	108.3	140.4	71,100	71,100	53,524	100.0	132.8
Beets	182.7	61.0	53.2	65.5	69.3	119.6	14,500	20,000	13,514	72.5	107.3
Cabbage (sauerkraut)	332.3	78.9	141.9	154.7	103.0	93.7	19,300	19,300	22,142	100.0	87.2
Carrots	127.3	100.0	116.7	116.7	125.0	269.1	-	-	-	-	-
Cucumbers	335.9	95.7	94.8	111.8	84.2	108.9	103,680	115,200	98,682	90.0	105.1
Pumpkin and squash	208.9	100.0	103.2	135.7	143.2	123.6	-	-	-	-	-
Spinach	181.0	97.6	84.7	116.4	79.1	181.7	37,404	c/41,560	23,022	90.0	162.5
Total	11,194.1	96.2	99.1	107.0	93.7	136.8	2,003,824	2,093,020	1,467,030	95.7	136.6

a/ Planted acreage in California only.
b/ Planted acreage in California only; unofficial estimate.
c/ Unofficial estimate.



Suggested
Production Goals
1946

Not for Publication
For Discussion
Purposes Only

TOBACCO

Requirements: Estimated requirements of U. S. produced tobacco consisting of usage of tobacco in domestic factories and exports for the 1946-47 marketing year compared with estimated 1945 production and disappearance during 1944-45 and 1945-46, are as follows in millions of pounds:

<u>Kind of Tobacco</u>	<u>Production</u>	<u>Disappearance</u>		<u>Requirements</u>
	1945	1944-45	1945-46	1946-47
Flue-cured	1,201.4	1,152.3	1,075.0	1,175.0
Burley	576.3	481.8	475.0	475.0
Maryland	23.1	29.2	30.0	30.0
Fire-cured	58.7	92.6	80.0	80.0
Dark Air-cured	43.6	42.2	39.5	39.5
Cigar Leaf	133.6	139.3	136.0	136.0
Total	<u>2,036.7</u>	<u>1,937.4</u>	<u>1,835.5</u>	<u>1,935.5</u>

In the determination of the above requirements it is estimated generally that usage of tobacco by domestic factories will continue at the 1945-46 marketing year level throughout 1946-47 but below the record high of 1944-45 because of the sharp cutback or termination of purchases by the military for overseas shipment. The estimates, however, include substantially larger exports in 1946-47 over 1945-46 and 1944-45 because of easing in the shipping situation and the desire of foreign countries to replenish stocks. Exports comprise an important part of the tobacco growers' market. The ability to supply this market during the next few years will have an important effect on the long-time welfare of American tobacco growers. While the complications involved in the resumption of international trade will have a direct bearing on exports, tobacco is being eagerly sought by many countries and it is believed that strenuous efforts will be exerted to import it. In the event, however, the relatively high level of estimated exports fails to materialize, the difference can be readily absorbed into stocks for domestic use without appreciable market disturbance.

Production Capacity: Production capacity as reported by the respective States for Burley, Maryland and dark air-cured tobacco is adequate in all States except North Carolina, but it falls short of the suggested goals in the case of flue-cured, fire-cured and cigar leaf tobacco. Increased acreages of these three kinds of tobacco are desirable if producers meet estimated demands in the 1946-47 marketing year and maintain an adequate supply. It is suggested, therefore, that the capacity to produce tobacco in these areas be reviewed in the light of the changed conditions and the expected demand.

SUGGESTED GOALS: Recommended 1946 Acreage Goals with Comparisons 1/

Kind of Tobacco	1946 Goal		Acreage		% Acreage Goal is of:	
	Production :		1945 :		1945 :	1937-41
	2/ : Acres		Indicated:	1937-41:	Indicated:	Acreage
	Million Lbs.	1,000	1,000	1,000	Percent	Percent
Flue-cured 3/	1,153.4	1,161.9	1,056.3	925.4	110	126
Burley 3/	494.0	476.6	529.6	395.3	90	121
Maryland	33.8	45.0	38.5	38.2	117	118
Fire-cured 3/	71.6	75.2	60.2	112.7	125	67
Dark Air-cured 3/	43.7	43.8	43.8	44.3	100	99
Cigar Leaf	146.2	103.4	93.1	97.4	111	106
Perique	.1	.3	.3	.5	100	60
Total	1,942.8	1,906.2	1,821.8	1,613.8	105	118

- 1/ Suggested goals are represented by percentage relationships with July 1 indicated acreages. Revisions in July 1 indicated acreage will change suggested acreage goals accordingly.
- 2/ Production resulting from suggested acreages with 1946 yields assumed the same as the 1940-44 average.
- 3/ Suggested goals and acreage distribution among states for Burley, fire-cured and dark air-cured tobaccos are within the respective acreages permitted under marketing quotas. Larger allotments may be required to achieve the flue-cured goal.

The total suggested 1946 acreage for tobacco exceeds the indicated total 1945 acreage, indicating the need for making substantial shifts in acreage grown in 1946 if production is to match estimated requirements for each of the several kinds of tobacco and if some desirable adjustment in the stocks and supply position are made. It should be fully recognized that prices paid growers for the 1945 crops of tobacco will be the strongest influencing factor on acreage of each kind grown in 1946. Also, farm acreage allotments under marketing quotas will be a determining factor on the acreage of flue-cured, Burley, fire-cured and dark air-cured tobacco.

Flue-cured: The suggested acreage goal for flue-cured tobacco in 1946 is 10 percent larger than the 1945 acreage. Although the 1945 production of flue-cured tobacco is the largest on record, the goal for 1946 is intended to result in a production equal to or in excess of that in 1945. This recommended level of production for 1946 appears to be justified on the basis of export requirements and domestic demand.

Burley: The acreage goal suggested for Burley is 10 percent below the 1945 acreage. This goal represents only 77.5 percent of the allotted acreage under Burley marketing quotas. Even though the stocks position justifies the suggested reduction in acreage, it may be difficult to get growers to reduce their plantings if prices received for the 1945 crop approach the levels of recent years. Growers, in planning their 1946 planting, however, should give serious thought to the supply situation and to possible price decline if production is maintained at the high level of recent years.

Fire-cured: Prices paid growers for fire-cured tobacco during recent years have not been sufficiently attractive, although at record levels, to encourage growers to increase production enough to meet requirements. The suggested acreage, even though 25 percent higher than 1945 planting, is only 80 percent of the acreage allotment under marketing quotas. Even though the suggested acreage increase is conservative in relation to stocks and foreign and domestic requirements, it will perhaps be difficult to get

growers to increase planting to the extent recommended. The committee, however, is of the opinion that growers should be fully informed of the need for the suggested increase and let them decide the action they wish to take with respect to meeting estimated requirements. Unquestionably, the decision reached by them will have considerable influence upon their welfare over the next several years.

Dark Air-cured: The suggested acreage for dark air-cured tobacco is the same as the acreage grown in 1945. Production at current levels is sufficient to meet estimated requirements and maintain stocks at relatively adequate levels.

Maryland: The suggested acreage increase of 17 percent in Maryland tobacco represents the reported "capacity acreage," all of which is needed to meet requirements and help increase supply to a level commensurate with usage.

Cigar Leaf: An acreage of cigar leaf tobacco about 11 percent larger than that grown in 1945 is needed to meet requirements and to improve the supply situation. The suggested acreage increase of 11 percent represents an increase of 10 percent in the filler and wrapper types and a 12 percent increase in cigar binder types.

The suggested acreages for 1946 for the several kinds of tobacco, when compared with the 1945 indicated acreages, represent the direction of change and the approximate degree of change needed rather than a determination of the absolute acreages to be grown in 1946.

Labor and Production Supplies: With the exception of curing barn space for cigar leaf tobacco and possibly flue-cured tobacco labor and production supplies are expected to be adequate for attainment of the suggested acreage goals in 1946. While local problems may develop with respect to each in isolated cases, the acreage changes from 1945 appear insufficient to present a serious problem except for cigar leaf curing barns, particularly in New England. In this case growers probably would have to erect additional barns if acreage is increased by the suggested percentage.

Marketing Facilities: Increased facilities for marketing and handling the 1946 crops of tobacco are anticipated and problems that have impeded disposal of some types in the last two years are not expected to be serious.

Recommendations for Goal Achievement: The committee has the following comments and recommendations for achievement of tobacco goals for 1946. Marketing quota allotments probably will serve as guides to producers of flue-cured, Burley, fire-cured and dark air-cured tobacco in the acreage planted to these kinds of tobacco. It is suggested, however, that producers of each kind of tobacco be informed through appropriate channels of the changes in acreage which appear necessary for meeting estimated requirements from the 1946 crop. Particularly should producers of Maryland and fire-cured tobacco be informed that supplies of these kinds of tobacco have diminished materially and some upward adjustments in acreages are desirable if the supply situation is to be brought into better balance with demand. This situation also applies to cigar binder and to a lesser extent to cigar filler. Burley tobacco producers should be informed that the supply of Burley tobacco is adequate and production in 1946 considerably in excess of requirements may result in excessive supplies, materially lower prices and the need for rather drastic adjustment in marketing quota allotments after 1946.

Proposed Price Support: Nonrecourse loans at 90 percent of the parity price as of the beginning of the marketing year (July 1, 1946, for flue-cured tobacco and October 1, 1946, for other types) will be made available to farmers and cooperative associations on tobacco produced in 1946. The specific schedules of loan rates will be announced at a later date.

TOBACCO: Suggested States Goals for 1946

State and Region	1946 Goal		Acreage		% Acreage Goal is of:	
	Production: 1,000 lbs.	Acres 1,000	1945 1,000	1945 1,000	1945	1945
					Indicated: 1937-41	Indicated: 1937-41
Percent Percent						
Flue-cured						
Va.	111,586	116.6	106.0	97.4	110	120
N. C.	790,898	785.4	714.0	621.5	110	126
E. C.	902,484	902.0	820.0	718.9	110	125
Ala.	241	0.3	0.3	0.3	100	100
Fla.	18,832	22.0	20.0	17.3	110	127
Ga.	98,419	105.6	96.0	84.1	110	126
S. C.	133,452	132.0	120.0	104.8	110	126
South.	250,944	259.9	236.3	206.5	110	126
U. S.	1,153,428	1,161.9	1,056.3	925.4	110	126
Burley						
Ind.	11,660	10.6	11.8	10.6	90	100
Mo.	7,632	7.2	8.0	6.0	90	120
Ohio	14,501	14.4	16.0	13.7	90	105
N. C.	35,793	32.2	35.8	30.3	90	106
Va.	16,851	13.3	14.8	10.8	90	123
W. Va.	3,046	3.2	3.6	3.3	90	97
N. C.	14,755	12.6	14.0	7.7	90	164
Ky.	343,332	336.6	374.0	279.0	90	121
Tenn.	81,823	78.3	87.0	63.7	90	123
E. C.	459,807	444.0	493.4	364.5	90	122
Ala.	85	0.1	0.1	0.2	100	50
South.	85	0.1	0.1	0.2	100	50
Kans.	298	0.3	0.3	0.4	100	75
West.	298	0.3	0.3	0.4	100	75
U. S.	493,973	476.6	529.6	395.3	90	121
Fire-cured						
Va.	13,810	15.5	15.2	20.9	102	74
Ky.	26,544	28.0	18.6	43.4	151	65
Tenn.	31,256	31.7	26.4	48.4	120	65
E. C.	71,610	75.2	60.2	112.7	125	67
U. S.	71,610	75.2	60.2	112.7	125	67
Dark Air-cured						
Ind.	188	0.2	0.2	0.4	100	50
N. C.	188	0.2	0.2	0.4	100	50
Va.	3,070	3.5	3.5	3.2	100	109
Ky.	35,416	35.1	35.1	36.3	100	97
Tenn.	4,995	5.0	5.0	4.4	100	114
E. C.	43,481	43.6	43.6	43.9	100	99
U. S.	43,669	43.8	43.8	44.3	100	99
Other Domestic						
Mass.	11,637	7.1	6.3	6.0	113	118
Conn.	26,774	19.5	17.2	16.8	113	116
N. Y.	1,224	0.9	0.8	1.0	115	90
Pa.	54,682	38.0	35.9	30.9	106	123
N. E.	94,317	65.5	60.2	54.7	109	120
Minn.	996	0.8	0.7	0.6	110	133
Ohio	8,378	7.5	5.4	14.8	139	51
Wisc.	38,844	26.0	23.6	22.7	110	115
N. C.	48,188	34.3	29.7	38.1	115	90
Md.	33,795	45.0	38.5	38.2	117	118
E. C.	33,795	45.0	38.5	38.2	117	118
Fla.	2,948	2.3	2.5	3.5	110	80
Ga.	790	0.8	0.7	1.1	110	73
La.	116	0.3	0.3	0.5	100	60
South.	3,854	3.9	3.5	5.1	110	76
U. S.	180,154	148.7	131.9	136.1	113	109

Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

FEED GRAINS

Summary: A 1946 acreage goal for the feed grains, corn, oats, barley, and sorghums for grain of about 164 million acres is recommended. This acreage is expected to produce enough grain to meet all probable requirements, including exports, and will stock the Ever-normal Granary to a fully adequate level. This goal is 103 percent of the acreage seeded to these crops in 1945, 99 percent of the comparable 1945 goal, 99 percent of the acreage recommended by State Production Adjustment Committees, and 108 percent of the acreage devoted to these crops in the prewar period 1937-41. The recommended goal for corn is 97 million acres, for oats 46 million acres, for barley 13 million acres, and for sorghums other than for syrup 16.6 million acres of which 7.7 million acres should be for harvest as grain. It is believed that conditions of production and marketing will be favorable to the attainment of these goals, but no conditions are now foreseen which would justify exceeding these goals, except possibly for the small grains as nurse crops for grasses and legumes, of which additional seedings are needed.

Requirements: Total estimated requirements in the 1946-47 crop year for feed grains are approximately 120.0 million tons, consisting of 87.8 million tons or 3,136 million bushels of corn, 21.6 million tons or 1,350 million bushels of oats, 6.3 million tons or 264 million bushels of barley, and 3.7 million tons or 133 million bushels of sorghum grains.

Of the total requirements, those for feed are by far the most important except for barley, and more than half the total requirement for barley is for feed. Feed requirements are based on the production of 167.4 million production units of livestock in 1946-47 with a rate of feeding of 1,500 pounds of concentrates per production unit. This number of production units in 1946-47 (167.4 million) compares with a probable 175 million in 1945-46, 176.2 million in 1944-45, and 153.9 million in the prewar years, 1937-41. Assumed production units for 1946-47 are 5 percent less than those in the year just closed but 9 percent more than were produced before the war. It is assumed that all types of livestock will be fed in larger quantities in 1946-47 than in the prewar period, except sheep and lambs and horses and mules, with the largest increase in hogs and poultry. However, it is assumed that production of all types of livestock will be less in 1946-47 than for the 1944-45 year just ended. Major decreases are expected in lamb and mutton production and in poultry production, particularly in the number of chickens produced and the number of eggs laid. Beef production is assumed to be 4 percent less and pork production 2 percent less than in 1944-45.

The assumed rate of feeding of 1,500 pounds for 1945-46 compares with 1,518 pounds assumed for 1945-46, 1,504 pounds estimated fed in 1944-45, 1,480 pounds fed in 1943-44, and a prewar rate of feeding of 1,372 pounds of concentrates per livestock production unit. This rate is approximately equal to the rate of feeding during the war just ended when special circumstances induced heavy rates of feeding, and is 9 percent in excess of the prewar rate of feeding. It is recognized that conditions inducing continuation of recent feeding practices may not exist in 1946-47.

Acreage goals have been developed on the assumption that the use of grains other than for livestock feed will continue at a high rate during 1946-47. Provision has been made for 14.9 million tons in contrast with 14.7 million tons estimated to have been used out of the 1944 crop, and 11.8 million tons used for these purposes from the 1937-41 crops. Goals also have been developed on the assumption that it is advisable to start replenishing stocks which have been depleted during the war by heavy feeding and increased exports. Provision

has been made for rebuilding stock levels by 1.9 million tons during the crop year 1946-1947 to a level of 16.3 million tons. A 16.3-million-ton closing stock for 1946-47 would compare with 14.2 million tons at the end of the 1944-45 crop year and an average stock of 20.1 million tons in the prewar years 1937-41. The major increase in stocks is planned for corn during the year ahead, and it is expected that corn stocks would be built to a level of about 475 million bushels by October 1, 1947.

Production Capacity: In July, before the end of the war, State Production Adjustment Committees reported that farmers could grow as large an acreage of feed grains in 1946 as in 1944, if at planting time the prospective needs for feed grains were at the wartime level. Current prospects for a labor and machinery situation more favorable than the Committees assumed in July would make it somewhat easier for farmers to plant the suggested acreage for 1946.

Some State Committees, particularly those in the Corn Belt, pointed out, that cultivated crops, especially corn and soy beans, have been grown on an increasing proportion of the cropland since 1940. This intensive use of the land has removed unusually large amounts of plant food elements, and on some farms soil erosion has been so greatly accelerated that yields per acre are likely to decrease in the years immediately ahead. These Committees believe that more feed units and hence more livestock products can be produced for meeting the prospective demand for meat, milk, and poultry products in the next few years by some readjustment in crop production programs in the direction of a better balance between corn, small grains, and legumes and grasses.

In the feed-deficit areas, where farmers increased the acreage of feed grains in 1944 because of unsatisfactory experience in obtaining concentrates, State Committees suggest almost as large or larger acreages of feed grains in 1946. In the East Central and Southern States, the suggested increase is in oats and barley, which are better adapted than corn and require less labor per acre for production. State Committees in several Southern States emphasize the need for gradually shifting from corn to small grains as a means of increasing total feed production. Both corn and barley, but principally corn, would be increased in the Western States.

Suggested Goals: In establishing the individual goals, requirements have been assumed for individual crops with the recognition that there is a high degree of substitutability between them. This is particularly true for use as feed but applies to other uses to a considerable extent. The major consideration is the total tonnage requirement of 119.4 million tons, and this has been broken down in such way as to give the needed acreage which it is considered could be grown to best advantage.

National acreage goals are recommended for corn, oats, and sorghums which are almost identical with the total of the individual State acreages suggested by the State Production Adjustment Committees. For these crops there is also very little difference between the State goals recommended here and the acreages suggested by the individual State Committees.

The suggested goal acreage for planting to corn in 1946 is 97 million acres. This acreage would produce 3,136 million bushels at a yield of 32.3 bushels per planted acre. This yield is considered to be the most probable yield for 1946, considering performance during recent years and the continued adoption of higher-yielding hybrid varieties of corn. This yield compares with 32.6 bushels per acre in 1945, 32.7 in 1944, and 28.1 in the prewar years 1937-41. The suggested goal acreage is approximately 105 percent of the acreage planted during the prewar period, 103 percent of the acreage planted in 1945 98 percent of the 1945 goal and 100 percent of the acreage which State Production Adjustment Committees considered to be desirable for 1946. This acreage goal is considered adequate to produce all the corn that is needed to meet probable

requirements and to supply stocks at the end of the year of 469 million bushels. A production of 3,136 million bushels in 1946 would compare with 3,078 in 1945, 3,228 in 1944, 3,034 in 1943, and 2,582 million bushels in the pre-war years 1937-41. Yields as much as 10 percent less than those indicated would still result in sufficient production to fill consumption requirements in 1946-47 and leave a minimum working stock at the end of the crop year. Yields 10 percent in excess of those considered probable in 1946 have never been experienced and are highly improbable. The Ever-Normal Granary storage program is considered capable of handling any supplies which might result from planting this acreage goal if yields were in excess of those considered probable.

Suggested corn goals are about equal to or in excess of the 1945 acreage in all major regions of the United States, with largest increases in the Southern and Western States where larger than average acreage declines were experienced in 1945.

The suggested goal acreage of oats in 1946 is 46 million acres. This acreage should produce 1,350 million bushels of oats if assumed yields of 29.3 bushels per acre are obtained. The assumed yield compares with 34.5 bushels per acre obtained in 1945, 27.1 in 1944, and 28.5 in the prewar years 1937-41. The unusually high yields of 1945 are improbable in 1946. However, improved varieties of oats are being adopted fairly rapidly, and an upward trend in yields is apparent and is reflected in the assumed yield for 1946. The suggested goal acreage is approximately 117 percent of the acreage planted in the prewar period 1937-41, 100 percent of that planted in 1945, 104 percent of the 1945 goal, and 99 percent of the acreage suggested by the State Production Adjustment Committees. The resulting production of 1,350 million bushels would compare with 1,130 million bushels in the prewar years 1937-41, 1,584 million bushels in 1945, and 1,166 million bushels in 1944.

Should the suggested acreage goal be planted and a yield equal to that obtained in 1945 be experienced in 1946, production would be sufficient to leave carry-over stocks of about 450 million bushels on July 1, 1947. Unless consumption were increased above that assumed in the suggested goal, these stocks would be excessive of needs, but it is considered advisable to assume the risk of such stocks since oats constitute a most desirable nurse crop, and increased seedings of grasses and legumes are desired and can scarcely be expected with reduced seedings of small grains.

The suggested 1946 goal for barley is 13 million acres. The assumed yield on this acreage of 20.3 bushels per acre would produce 264 million bushels of barley, which would be sufficient to meet all known requirements and provide for adequate carry-over stocks at the end of the crop year. Production in 1945 was 277 million bushels, 284 in 1944, and 286 in the prewar years 1937-41. The assumed yield of 20.3 bushels per acre compares with 23.3 bushels obtained in 1945, 19.9 in 1944, and 19.9 in the prewar period 1937-41. This goal acreage is approximately 91 percent of the acreage planted during the prewar period 1937-41, 109 percent of that planted in 1945, 93 percent of the 1945 goal and 93 percent of the acreage recommended by the State Production Adjustment Committees for 1946. The suggested goal reflects the trend away from barley in the Corn Belt where the improved varieties of oats are out-competing barley, while at the same time reflecting the increasing preference for barley as a feed grain in the East Central and Western areas. The goal is approximately one million acres in excess of that planted under adverse conditions in 1945 and also is approximately one million acres less than the acreage which the State Committees indicated would be desired. For most States the acreage indicated as desirable has been accepted by the Goals Committee. The goals suggested for Minnesota, Kansas, and North Dakota are less than the State acreage, while the acreage goal recommended for Nebraska and Wisconsin is larger than the State acreage, which reflects a rapid downward trend in acreage. The suggested increase in Wisconsin is made in order to increase assurance of necessary supplies of brewing barley.

The seeding of 16.6 million acres of sorghums for use other than the production of syrup is recommended. This acreage is 97 percent of the 1937-41 acreage, 103 percent of the 1945 acreage, 99 percent of the 1945 goal, and 96 percent of the acreage indicated by the State Production Adjustment Committees as desirable in 1946. Of this acreage it is recommended that 7.7 million acres be planted for harvest as grain. The latter acreage will produce 132 million bushels if an assumed yield of 17.1 bushels per harvested acre is obtained. Production in 1945 was 107 million bushels, 182 in 1944, 104 in 1943, and 77 on the average in the prewar period 1937-41. The assumed yield of 17.1 bushels per acre compares with 14.7 in 1945, 19.9 in 1944, 15.6 in 1943, 18.2 in 1942, and a 1937-41 average of 14.4 bushels per acre. The suggested goal for sorghums for grain is 145 percent of the 1937-41 average acreage, 106 percent of the 1945 harvested acreage, 95 percent of the 1945 goal, and approximately 100 percent of the acreage recommended by State Committees for 1946. The acreage reflects the rising trend in the production of sorghums for grain for all producing areas, with the most marked increase being shown in Texas which grows more than half the acreage.

Storage and Marketing Facilities: Storage and marketing facilities other than boxcars are adequate to handle the 1946 recommended production of feed grains in an orderly manner, assuming normal weather conditions and no unforeseen labor shortages. Production goals were not reduced because of the possible inadequacy of transportation facilities. However, every effort should be made to coordinate grain shipments so that a backlog of old grain does not interfere with the movement of the 1946 crop. Present storage and drying facilities are inadequate to handle anticipated production of grain sorghums, especially in the Corpus Christi, Texas area, if such grain is harvested under adverse weather conditions. Export facilities including port and shipping facilities are adequate to handle the maximum quantity of feed grains that will be exported.

Recommendations for Goal Achievement: Farm labor supplies in 1946 are expected to reflect the demobilization of the military forces and the declining rate of industrial production. Labor available on grain-producing farms is expected to be more adequate than in any recent years, and, except possibly for limited areas, will be adequate for producing and harvesting the acreage of feed grains in the suggested goal. Supplies of new farm machinery, machinery repairs, and the facilities to repair farm machinery are expected to be more adequate in 1946 than in several previous years and should be no hindrance to the attainment of the goals suggested. Supplies of fertilizer used in some areas on feed grains, particularly small grains east of the Mississippi River, probably will not be sufficient to meet all needs during the 1946 planting season. However, this situation is not of sufficient significance to prevent the attainment of the goals suggested.

Proposed Support Price:

Nonrecourse loans at 90 percent of the parity price as of October 1, 1946, will be made available to farmers on corn produced in 1946 and stored on farms. The specific loan rate for each location will be announced at a later date. Corn grading No. 3, or better, except for moisture content, will be eligible for loan. Ear corn containing more than 20-1/2 percent moisture and shelled corn containing more than 13-1/2 percent moisture will not be eligible for loans. The loans will be available as follows: From December 1, 1946, to March 31, 1947, for ear corn containing not more than 20-1/2 percent moisture; from December 1, 1946, to April 30, 1947, for ear corn containing not more than 17-1/2 percent moisture; from December 1, 1946, to May 31, 1947, for ear corn containing not more than 15-1/2 percent moisture; and from June 1, 1947, to September 30, 1947, for shelled corn containing not more than 13-1/2 percent moisture. The loans will mature on September 30, 1948, or earlier upon demand.

Nonrecourse loans will be made available to farmers on barley produced in 1946 and stored on farms or in warehouses. The loan rates for barley will be based on the loan rates for corn and relative feeding values. Loan rates will vary by grade and by areas in accordance with a schedule of differentials to be announced later. A deduction of 7 cents per bushel will be made on warehouse-stored barley unless the producer has paid the storage charges through April 30, 1947. The loans will be available until December 31, 1946, and will mature on April 30, 1947, or earlier upon demand.

Nonrecourse loans will be made available to farmers on oats produced in 1946 and stored on farms or in warehouses. The loan rates for oats will be based on the loan rates for corn and relative feeding values. Loan rates will vary by grade and by areas in accordance with a schedule of differentials to be announced later. A deduction of 7 cents per bushel will be made on warehouse-stored oats unless the producer has paid the storage charges through April 30, 1947. The loans will be available until December 31, 1946, and will mature on April 30, 1947 or earlier upon demand.

Nonrecourse loans will be made available to farmers on grain sorghums produced in 1946 and stored on farms or in warehouses. The loan rates for grain sorghums will be based on the loan rates for corn and relative feeding values. Loan rates will vary by grades and by areas in accordance with a schedule of differentials to be announced later. A discount will apply to mixed grain sorghums and grain sorghums grading discolored, weevily, or smutty will not be eligible for loans. A deduction of 12 cents per hundred pounds will be made on warehouse-stored grain sorghums unless the producer has paid the storage charges through June 30, 1947. The loans will be available until February 28, 1946, and will mature on April 30, 1947, or earlier upon demand.

FEED GRAINS: Requirements for fiscal year 1946-47

Estimated Requirements	Corn	Oats	Barley	Grain Sorghums
		million bushels		
Food Requirements	208.9	44.3	a/107.2	6.6
U.S. Civilian	173.2	41.4	96.3	3.5
Non-Civilian	35.7	2.9	10.9	3.1
Military & War Services	1.0	.9	.1	0
Exports & Shipments	34.7	2.0	10.8	3.1
Industrial Requirements	95.2	0	7.4	0
Seed Requirements <u>b/</u>	13.5	110.0	20.0	3.0
Feed Requirements <u>b/</u>	2625.0	1316.0	143.0	114.0
Operating Stocks				
Beginning of year	275.0	350.0	70.0	n.a.
End of year	469.1	239.3	76.6	n.a.
Net change	1 194.1	110.7	1 6.6	n.a.
Imports	1.0	10.0	20.0	0
Total	3135.7	3149.6	264.2	131.6

a/ Includes 83.2 million bushels for brewing purposes.

b/ Domestic requirements only.

FEED GRAINS: Units of livestock produced with concentrate feeds,
1937-38 to 1945-46 1/

Item	Year beginning October 1.						Change 1946-47 from 1941-42
	Average	1943-44	Estimated	Assumed	Assumed	1946-47	
	1937-38		for	for	for	from	
	to						
	1941-42		1944-45	1945-46	1946-47	1941-42	1944-45
	Million units	Million units	Million units	Million units	Million units	Percent	
Milk	26.0	28.0	28.7	28.7	28.6	+10	0
Cattle and calves	18.7	22.7	22.7	22.3	21.7	+12	-4
Hogs	53.8	75.7	61.8	63.3	60.9	+15	-2
Sheep and lambs	1.4	1.4	1.3	1.2	1.2	-14	-8
Poultry	29.5	39.6	39.5	37.9	3/34.1	+16	-14
Eggs	18.2	25.5	25.1	25.4	20.4	+12	-19
Chickens produced	8.6	10.3	9.7	9.6	8.8	+2	-9
Broilers	1.1	2.0	2.6	2.7	2.7	+145	+4
Turkeys	1.6	1.8	2.1	2.2	2.2	+38	+5
Horses and mules	21.0	18.7	17.9	17.3	16.6	-21	-7
Other livestock <u>2/</u>	4.3	4.3	4.3	4.3	4.3	0	0
Total	153.9	190.4	176.2	175.0	167.4	+9	-5
Feeding rate per unit, pounds of concentrates	1,372	1,480	1,504	1,518	1,500	+9	0

1/ A unit of livestock production is 4,237 pounds of milk, 314 pounds of hogs (live wgt.) 833 pounds of cattle (live wgt.), 3,704 pounds of sheep and lambs (live wgt.), 185 dozen eggs, 70 chickens produced, 116 broilers produced, 20 turkeys produced, or .695 horses and mules fed a year. Each of these quantities of livestock production uses the same quantity of feed concentrates (average for the United States). A livestock production unit measures the volume of livestock production (including work from horses and mules) coming from grain and other concentrates in terms of the output of one average milk cow in a year.

2/ Other kinds of livestock on farms and livestock not on farms

3/ Calculated for the crop year assuming that chicken and egg production in 1947 would be 15 percent below 1945 calendar year production and that broiler and turkey production would remain the same as in 1945.

FEED GRAINS: Supply and utilization for 1937-38 to 1946-47

Item	Average:				
	1937-38:	1943-44:	1944-45:	1945-46:	1946-47
	to 1941-42:	1943-44:	1944-45:	for 1945-46:	for 1946-47
	1,000	1,000	1,000	1,000	1,000
	tons	tons	tons	tons	tons
<u>Supply</u>					
Feed grains:					
Stocks beginning crop year <u>1/</u>	17,087	16,673	10,710	14,153	13,400
Production <u>2/</u>	99,391	113,850	120,971	121,116	119,418
Imports	127	2,126	2,003	280	540
Total	116,605	132,649	133,684	135,549	133,358
Other grains for feed:					
Wheat (domestic and imported)	4,051	13,152	7,800	4,800	3,750
Rye (domestic and imported)	580	848	420	336	336
Total	4,631	14,000	8,220	5,136	4,086
Byproduct feeds:					
Mill byproducts	6,538	8,136	9,101	8,915	
Oilseed cake and meal	3,903	6,223	6,128	6,025	
Animal proteins	2,943	2,914	2,720	2,770	
Other byproduct feeds	2,000	1,600	1,600	1,600	
Total	15,384	18,873	19,549	19,310	19,310
Total Supply <u>3/</u>	136,621	165,522	161,453	159,995	156,754

Utilization

Feed:					
Feed grains	85,557	107,971	104,693	107,390	102,154
Wheat and rye	4,631	14,000	8,220	5,136	4,086
Byproduct feeds	15,384	18,873	19,549	19,310	19,310
Total	105,572	140,844	132,462	131,836	125,550
Feed grains for seed, food, industry, and exports:					
	11,764	12,551	14,651	13,768	14,888
Total utilization (year beginning October 1)	117,336	153,395	147,113	145,604	140,438
Total utilization adjusted to crop year	116,545	154,812	147,300	145,604	140,438
Stocks end of crop year <u>1/</u>	20,076	10,710	14,153	14,391	16,316

1/ Farm, terminal market, and Government-owned stocks of corn October 1, oats July 1, and barley June 1.

2/ Production of corn, oats, barley, and sorghum grains indicated on November 1, 1945.

3/ Supply per grain-consuming unit:

	Tons	Tons	Tons	Tons	Tons
Animal unit January 1	1.06	.97	1.10	1.09	1.11
Production unit, in year	.89	.87	.92	.91	.94

CORN: Suggested State Goals for 1946

State and Region	: Suggested 1946 Goal : : Production : Acres : :	Acreage : 1945 : 1937-41 : : Indicated : :	% Acreage Goal is of : 1945 : 1937-41 : Indicated : :			
	1,000	1,000	1,000	1,000	Percent	Percent
Maine	680	17	15	15	113	113
N. H.	656	16	15	15	107	107
Vt.	2,625	70	69	70	101	100
Mass.	1,763	43	43	41	100	105
R. I.	342	9	9	9	100	100
Conn.	2,120	53	53	48	100	110
N. Y.	26,250	750	732	687	102	109
N. J.	7,566	194	179	190	108	102
Pa.	58,425	1,425	1,385	1,336	103	107
N. E.	100,427	2,577	2,500	2,411	103	107
Ill.	435,169	8,881	8,784	8,215	101	108
Ind.	225,600	4,700	4,619	4,203	102	112
Iowa	587,600	11,300	11,268	9,827	100	115
Mich.	63,000	1,800	1,812	1,580	99	114
Minn.	250,100	6,100	6,119	4,541	100	134
Mo.	135,000	4,500	4,397	4,261	102	106
Nebr.	232,092	8,596	8,742	7,457	98	116
Ohio	177,600	3,700	3,630	3,482	102	106
S. Dak.	100,000	4,000	4,308	3,258	93	123
Wis.	110,700	2,700	2,733	2,314	99	117
N. C.	2,316,861	56,277	56,412	49,138	100	115
Del.	4,031	139	131	143	106	97
Md.	17,850	510	466	494	109	103
Va.	36,450	1,350	1,235	1,381	109	98
W. Va.	12,750	425	348	437	122	97
N. C.	49,518	2,358	2,248	2,439	105	97
Ky.	70,200	2,700	2,611	2,652	103	102
Tenn.	63,600	2,650	2,547	2,745	104	96
E. C.	254,399	10,132	9,586	10,291	105	98
Ala.	43,950	2,930	2,872	3,535	102	83
Ark.	34,200	1,900	1,685	2,254	113	84
Fla.	7,000	700	695	742	101	94
Ga.	39,675	3,450	3,476	4,351	99	79
La.	18,600	1,200	1,213	1,630	99	74
Miss.	41,075	2,650	2,572	3,111	103	85
Okla.	35,000	2,000	1,559	1,820	128	110
S. C.	22,400	1,400	1,433	1,754	98	80
Tex.	79,200	4,950	4,211	4,937	117	100
South	321,100	21,180	19,716	24,134	107	88
Ariz.	440	40	40	39	100	103
Calif.	2,310	70	67	78	104	90
Colo.	14,450	850	790	1,125	108	76
Idaho	1,440	30	30	48	100	62
Kansas	84,700	3,850	3,193	2,888	121	133
Mont.	3,750	250	147	181	170	138
Nev.	120	4	3	3	133	133
N. Mex.	2,145	165	178	218	93	76
N. Dak.	28,350	1,350	1,283	1,109	105	122
Oreg.	1,650	50	44	66	114	76
Utah	840	30	26	27	115	111
Wash.	1,230	30	29	36	103	83
Wyo.	1,495	115	110	183	104	63
West	142,920	6,834	5,940	6,001	117	116
U. S.	3,135,707	97,000	94,154	91,975	103	105

OATS: Suggested State Goals for 1946

State and Region	Suggested 1946 Goal		Acreage		% Acreage Goal is	
	Production	Acres	1945	1937-41	1945	1937-41
			Indicated	Indicated	Indicated	Indicated
	1,000	1,000	1,000	1,000	Percent	Percent
Maine	3,182	95	92	117	103	81
N. H.	253	13	13	15	100	87
Vt.	1,420	71	70	80	101	89
Mass.	175	14	15	14	93	100
R. I.	31	3	3	3	100	100
Conn.	140	14	13	14	108	100
N. Y.	22,820	815	792	864	103	94
N. J.	1,170	45	45	51	100	88
Pa.	25,375	875	866	894	101	98
N. E.	54,566	1,945	1,909	2,052	102	95
Ill.	139,232	3,664	3,531	3,626	104	101
Ind.	45,000	1,500	1,534	1,363	98	110
Iowa	198,625	5,675	5,670	5,719	100	99
Mich.	51,000	1,500	1,612	1,336	93	112
Minn.	164,500	4,700	5,466	4,216	86	111
Mo.	46,200	2,200	1,912	2,108	115	104
Nebr.	65,728	2,528	2,514	1,879	101	135
Ohio	40,800	1,200	1,259	1,159	95	104
S. Dak.	102,000	3,400	3,569	2,012	95	169
Wis.	124,000	3,100	3,066	2,440	101	127
N. C.	974,285	29,467	30,133	25,863	98	114
Del.	120	6	6	4	100	150
Md.	1,014	39	41	38	95	103
Va.	3,500	175	167	131	105	134
W. Va.	1,505	86	88	99	98	87
N. C.	8,000	400	391	297	102	135
Ky.	1,620	120	111	110	108	109
Tenn.	3,575	275	259	136	106	202
E. C.	19,334	1,101	1,063	815	104	135
Ala.	4,035	269	271	168	99	160
Ark.	9,000	500	457	311	109	161
Fla.	675	135	120	18	112	750
Ga.	12,800	800	771	571	104	140
La.	6,875	275	242	75	114	367
Miss.	15,360	580	559	180	104	322
Okla.	28,800	1,600	1,294	1,540	124	104
S. C.	16,575	850	749	576	113	148
Tex.	38,430	1,230	1,996	1,300	92	102
South.	132,850	6,829	6,459	5,239	106	131
Ariz.	330	30	25	22	120	136
Calif.	5,350	535	518	434	103	123
Colo.	6,500	250	230	188	109	133
Idaho	6,270	209	214	218	98	96
Kansas	36,520	1,660	1,296	1,641	128	101
Mont.	12,600	450	446	408	101	110
Nev.	276	12	12	8	100	150
N. Mex.	665	35	35	39	100	90
N. Dak.	75,000	2,500	2,594	1,816	96	138
Oreg.	9,000	450	434	446	104	101
Utah	1,820	52	60	46	87	113
Wash.	8,100	300	305	266	98	113
Wyo.	4,125	165	178	145	93	114
West.	166,553	6,648	6,347	5,677	105	117
U. S.	1,349,591	46,000	45,911	36,646	100	116

BARLEY: Suggested State Goals for 1946

State and Region	Suggested 1946 Goal		Acreage		% Acreage Goal is of	
	Production	Acres	1945 Indicated	1937-41	1945 Indicated	1937-41
	1,000	1,000	1,000	1,000	Percent	Percent
Maine	84	3	3	4	100	75
Vt.	81	3	3	6	100	50
N. Y.	2,640	110	93	142	118	77
N. J.	175	7	7	6	100	117
Pa.	3,500	125	96	107	130	117
N. E.	6,480	248	202	265	123	94
Ill.	1,560	65	50	136	130	48
Ind.	1,200	50	46	41	109	122
Iowa	100	4	3	421	133	1
Mich.	4,200	150	139	206	108	73
Minn.	19,500	750	526	1,964	143	38
Mo.	1,600	100	103	199	97	50
Nebr.	7,440	465	661	1,390	70	33
Ohio	500	20	23	29	87	69
S. Dak.	28,800	1,800	1,342	1,830	134	98
Wis.	4,500	150	95	731	158	21
N. C.	69,400	3,554	2,988	6,953	119	51
Del.	377	13	12	3	108	433
Md.	2,030	70	70	59	100	119
Va.	2,000	80	80	68	100	118
W. Va.	250	10	10	9	100	111
N. C.	1,197	63	63	17	100	371
Ky.	3,150	175	100	65	175	269
Tenn.	2,160	135	134	61	101	221
E. C.	11,164	546	469	282	116	194
Ala.	156	12	14	-	86	-
Ark.	210	15	13	11	115	136
Ga.	216	12	11	3	109	400
Miss.	576	32	27	-	119	-
Okla.	3,000	200	158	432	127	46
S. C.	240	15	13	8	115	188
Tex.	6,076	434	439	275	99	158
South	10,474	720	675	729	107	99
Ariz.	2,000	125	149	69	84	181
Calif.	35,700	1,700	1,816	1,530	94	111
Colo.	18,000	1,000	798	625	125	160
Idaho	11,488	359	354	233	101	154
Kansas	9,600	800	501	982	160	81
Mont.	20,400	850	635	190	134	447
Nev.	980	28	27	15	104	187
N. Mex.	760	40	30	17	133	235
N. Dak.	45,000	2,250	2,494	1,859	90	121
Oreg.	6,500	260	263	219	99	119
Utah	6,400	160	160	100	100	160
Wash.	6,750	225	238	131	95	172
Wyo.	3,105	135	123	91	110	148
West	166,683	7,932	7,588	6,061	105	131
U. S.	264,201	13,000	11,922	14,290	109	91

SORGHUMS (for grain): Suggested State Goals for 1946

State and Region	1946 Goal		Acreage		% Acreage Goal is of	
	Production	Acres	1945		1945	
			Indicated	1937-41	Indicated	1937-41
	1,000	1,000	1,000	1,000	Percent	Percent
Ill.	27	1	1	2	100	50
Iowa	20	1	1	5	100	20
Mo.	1,330	70	60	68	117	103
Nebr.	1,875	125	84	244	149	51
S. Dak.	1,950	150	74	138	203	109
N.C.	5,202	347	220	457	158	76
N. C. Terr.	50	2	2	—	100	—
D.C.	50	2	2	—	100	—
Ark.	135	9	7	12	129	75
La.	51	3	2	2	150	150
Okla.	10,530	810	727	767	111	106
Tex.	81,000	4,500	4,542	2,338	99	192
South	91,716	5,322	5,278	3,119	101	171
Ariz.	1,664	52	53	26	98	200
Calif.	4,536	126	101	142	125	89
Colo.	4,200	300	240	158	125	190
Kansas	20,160	1,260	1,200	1,210	105	104
N. Mex.	4,060	290	173	196	168	148
N. Dak.	12	1	1	—	100	—
West	34,632	2,029	1,768	1,732	115	117
U. S.	131,600	7,700	7,268	5,308	106	145

SORGHUMS (except sirup): Suggested State Goals for 1946

State and Region	1946 Suggested Goal	1937-41 :	1942 :	1943 :	1944 :	1945 Indicated July 1
		(Planted)	Thousand Acres			
Ill.	8	25	30	13	9	8
Ind.	7	10	18	8	7	7
Iowa	14	90	74	38	21	13
Minn.	9	41	34	17	12	9
Mo.	250	392	326	274	266	251
Nebr.	555	1,407	830	662	704	526
S. Dak.	600	1,068	1,002	739	606	436
Wis.	1	8	9	3	1	1
N. C.	1,444	3,041	2,323	1,754	1,626	1,251
Va.	10	4	3	3	5	8
W. Va.	1	-	-	-	-	-
N. C.	14	16	15	14	15	14
Ky.	27	32	32	26	25	26
Tenn.	50	46	46	41	47	49
E. C.	102	98	96	84	92	97
Ala.	50	33	32	32	39	45
Ark.	100	118	89	108	89	80
Ga.	34	41	38	38	34	34
La.	15	12	13	15	15	15
Miss.	60	35	32	35	51	50
Okla.	2,000	1,958	1,965	2,372	2,210	1,811
S. C.	25	17	19	20	20	19
Tex.	7,300	6,557	6,512	7,948	8,303	7,975
South	10,084	8,771	8,700	10,568	10,761	10,029
Ariz.	70	41	48	54	86	72
Calif.	130	145	147	128	115	104
Colo.	700	903	720	630	785	715
Kans.	3,425	3,371	3,154	3,486	3,844	3,197
Mont.	5	11	8	7	5	4
N. Mex.	575	520	506	505	631	513
N. Dak.	50	143	104	95	58	50
Wyo.	15	26	20	13	14	16
West	4,970	5,160	4,707	4,918	5,538	4,671
U.S.	16,600	17,070	15,826	17,324	18,017	16,048

Suggested
Production Goals
1946

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HAY

In the postwar period it is estimated that an acreage of tame hay nearly 20 percent larger than was harvested annually from 1937 to 1941 will be needed to provide more hay for livestock and to build up our farmland. The goal acreage suggested for 1946 is about 5 percent above the prewar average and about 1 percent above the 1945 acreage. This acreage will provide more hay for livestock in the South. It is not as large an acreage as is needed from the longer viewpoint because of the need for large acreages of grains and oilcrops in 1946. More emphasis needs to be put on improvement in quality since the feed value of the crop is far below what it could be if it were cut and handled in a manner to preserve the feeding value.

Roughage is a more important source of feed for livestock than is generally thought. It has been estimated that before the war hay and pasture accounted for over 50 percent of all feed used by all livestock. They accounted for 90 percent of the feed of sheep, over 70 percent of the feed of beef cattle and over 60 percent of the feed of dairy cattle and horses and mules. Corn and sorghum fodder and stover and straw from small grains are partly utilized for feed but usually they are plowed under and go directly back to the soil. In emergencies, however, they are very useful sources of feed.

Tame hay is the most important class of harvested roughage in most States. It consists (in order of tons produced) of (1) alfalfa, (2) clover and timothy, (3) lespedeza, (4) soybeans, (5) grains cut green and miscellaneous grasses, (6) peanut vine, (7) cowpea, and (8) sweetclover. Wild hay (not included in tame hay acreage) is important in the States west of the Mississippi River, especially in the Great Plains Area. Ordinarily it is not a part of the cultivated acreage in farms. The tame hay acreage is usually a part of the cultivated land and often is grown in regular rotation. It is the only part of forage production for which goals are suggested, although it accounts for less than one-third of the total forage supply including pasture.

The tame hay acreage in 1944 and 1945 was less than in 1942 and 1943, but more than in 1937-41. It has been cut into by the war demand for increased acreage of other crops. The number of hay-consuming animal units has increased faster than the hay acreage since 1940. However, for the country as a whole the current supply of hay in relation to livestock numbers is more favorable than in 1934 when there was about the same number of hay consuming animal units. Hay should form a larger percentage of the total nutrients fed to cattle and horses.

The production of hay in 1945 for the country as a whole is high relative to the livestock to be fed. Although weather damage to quality is rather widespread, most States have plenty of hay. There are only a few States where tame hay production in 1945 may be considered relatively short as compared with the livestock to be wintered. These States are: Illinois, Minnesota, Missouri, and North Dakota in the north; and Alabama, Florida and Louisiana in the south. The shortage in these States will not be severe enough to require above-normal marketing of livestock. In some States, existing supplies of hay and forage can be supplemented by corn fodder and straw. In others, more hay may have to be shipped in from surplus areas.

The hay goals for 1946 recognize the fact that we need to grow large acreages of feed grains and wheat to build up reserves of these grains. A large acreage of soybeans is also needed in 1946 and a large acreage of winter wheat was suggested in the wheat goals. The hay acreages are not as large as desirable for the longer viewpoint, but will have to be deferred until more pressing needs are met. Most of the increase in hay acreage suggested is in the South where the need is greatest.

Little change in tame hay acreage to be harvested in 1946 is recommended for the Northeastern Region since the recommended acreage, with assumed yields, will provide about an average quantity of tame hay per animal unit for the winter of 1946-47. A slight decrease is recommended for the North Central Region as a whole with increases suggested only for Illinois, Minnesota, and South Dakota. Most States in the North Central Region have large quantities of corn stover and some usually cut a large acreage of wild hay. Little change in the tame hay acreage (compared with 1945) is recommended for the East Central Region. In the Western Region an increase in tame hay acreage is recommended principally in North Dakota.

A 6 percent increase is recommended for the Southern Region for 1946 compared with 1945 even though there may be a smaller acreage of peanuts. This region is short of roughage in relation to its livestock, although it has made a substantial increase in the tame hay acreage as compared with prewar years. There has been a large increase in the use of peanut hay and lespedeza hay but a sharp reduction in cowpea hay and little change in other kinds of dry roughage. More legume hay is needed in this region.

From the longer viewpoint, larger legume and grass seedings in 1946 for hay and pasture in 1947 and 1948 are needed. Since seed supplies are short, it is necessary that seed beds be well prepared and that lime, phosphate and, potash be used where necessary so that lighter seedings can be used. More legumes and grasses are needed, not only for feeding livestock but in the cropping system to restore fertility and for conservation. Over a period of years maximum production of the entire farm requires a larger acreage of legumes than is now grown. Liming of large areas is a necessary prerequisite as well as the application of phosphate and potash.

In the South a much larger tonnage of forage is needed for livestock production. If more hay of good quality were available, less grain would have to be fed to milk cows and work stocks. Small grain seeded in the fall is a cover crop in the winter and may be used for grazing or cut for hay or grain the next summer. Lespedeza seeded on the small grain gives an additional supply of forage at small cost. This practice is especially adapted to much hilly land in the South on which the yield of corn is poor.

Improvement in the quality of hay is important since it has been estimated that the feed value of the crop could be increased by at least 25 percent if it were cut at the proper stage of maturity and then cured, handled, and stored to preserve the quality. Reports indicate that about 40 percent of the hay in some areas of the Northeast is cut at a stage of maturity which is too late for the production of good quality hay. In the northern dairy areas good quality hay is essential in the feeding program because it is the principal source of carotene or vitamin A.

It is estimated that pastures provide about 35 percent of all the livestock feed used each year in this country. This is compared with 40 to 45 percent of all feed from all concentrates fed to livestock and is over twice as much as the feed from hay. Pasture accounts for 75 to 80 percent of all feed for sheep, 60 percent of all feed for beef cattle, and from 30 to 40 percent for all feed consumed by dairy cattle and horses and mules. In many areas pastures are the most important feed for farm animals throughout the year and in all areas they are particularly important during the early summer. Pasture improvement in many places has resulted in good pastures for a longer season each year and more feed from each acre of pasture.

Improved pastures can be the source of more livestock feed than is now obtained from our present pasture acreage. Increased returns from the use of fertilizer and lime are very significant in the humid areas. Increases from reseeding, weed control, and controlled grazing are important in all parts of the country. These practices have been tested and their usefulness has been demonstrated. It is fortunate that economical production as well as maximum production results from pasture improvement.

Fertilizer and lime are essential to maximum production of high-quality pasturage. Soil treatment with lime and phosphate is recognized as one of the most effective ways to improve pastures, but in many areas the addition of potash is helpful and nitrogen is being used to good advantage by many farmers who need more feed from pastures. The increase in total digestible nutrients from improved pastures is important, but the higher protein content and higher percentage of calcium, phosphorus, and vitamins in the forage makes pasture improvement particularly desirable.

Mowing pastures to control weeds results in more and better quality feed for livestock. This practice can be used in combination with other types of pasture improvement and requires only such equipment as usually is available on every farm.

Reseeding and controlled grazing are practices whereby more feed can be had from pastures for a longer season each year. Ladino clover and brome grass are examples of crops which have recently gained prominence because of increased returns. Winter cover crops are an important source of late fall and early spring feed for livestock. Annual crops such as Sudan grass, millet, small grain, and many others can be used to good advantage to get more summer pasture. Rotation grazing of each half of the pasture so as to permit additional growth of the plants is often a way to get more feed. In combination with other methods of pasture improvement, these practices can be the means of getting the largest return from pastures.

TAME HAY: Suggested State Goals for 1946

State and Region	1946 Suggested Goal : Production : : (Tons)	Acreage : Acreage : : 1,000	1945 1/ : Indicated: 1937-41	% Acreage Goal is of : 1945 : : Indicated: 1937-41	Percent	Percent
Maine	870	890	889	893	100	100
New Hampshire	400	340	338	338	100	100
Vermont	1,140	900	884	889	102	101
Massachusetts	525	355	345	348	103	102
Rhode Island	46	35	34	35	103	100
Connecticut	415	290	282	272	103	106
New York	5,850	3,950	3,956	3,853	100	102
New Jersey	380	240	232	224	103	107
Pennsylvania	3,260	2,250	2,275	2,281	99	99
N. E.	12,886	9,250	9,235	9,133	100	101
Illinois	3,450	2,500	2,483	2,764	101	91
Indiana	2,570	1,890	1,885	1,943	100	97
Iowa	5,270	3,100	3,146	3,386	99	92
Michigan	3,450	2,500	2,529	2,606	99	96
Minnesota	4,625	2,900	2,815	2,901	103	97
Missouri	3,400	3,100	3,179	2,811	97	110
Nebraska	1,730	1,000	1,036	994	97	101
Ohio	3,360	2,300	2,307	2,431	100	95
South Dakota	840	600	581	787	103	76
Wisconsin	6,900	3,950	3,989	3,735	99	106
N. C.	35,595	23,840	23,950	24,148	100	98
Delaware	103	80	82	68	98	118
Maryland	570	440	433	401	102	110
Virginia	1,525	1,400	1,448	1,191	97	118
West Virginia	920	780	778	683	100	114
North Carolina	1,340	1,350	1,309	1,091	103	124
Kentucky	2,075	1,700	1,718	1,475	99	115
Tennessee	2,300	2,100	2,069	1,871	100	112
E. C.	8,833	7,850	7,837	6,780	100	116
Alabama	760	1,100	976	942	113	117
Arkansas	1,420	1,350	1,166	1,115	116	121
Florida	68	130	127	105	102	124
Georgia	770	1,450	1,433	1,174	101	124
Louisiana	420	350	286	301	122	116
Mississippi	1,130	950	897	830	106	114
Oklahoma	1,160	900	902	751	100	120
South Carolina	440	620	594	576	104	108
Texas	1,470	1,550	1,542	1,109	102	140
South.	7,638	8,400	7,923	6,903	106	122
Arizona	710	290	300	227	97	128
California	5,680	1,930	1,921	1,621	100	119
Colorado	1,840	1,050	1,025	1,015	102	103
Idaho	2,160	1,000	996	1,013	100	99
Kansas	850	950	952	725	100	130
Montana	1,875	1,250	1,219	1,087	103	115
Nevada	395	190	185	183	103	104
New Mexico	438	200	202	179	99	112
North Dakota	1,150	850	772	1,086	110	78
Oregon	1,700	880	879	858	100	103
Utah	1,100	510	507	496	100	103
Washington	2,020	1,010	1,011	873	100	116
Wyoming	785	550	545	570	101	96
West.	20,703	10,660	10,514	9,935	101	107
U.S.	85,655	60,000	59,459	57,197	101	105

1/ Acreage in July Crop Report.

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LEGUME AND GRASS SEEDS

Legume and grass seeds are essential materials in developing a sound farming program for the postwar years. Such a program will increase soil productivity and provide abundant feed for livestock so as to contribute to the following objectives:

Abundant production of farm products so that there will be plenty of food for all people; balanced production to make returns to farmers as large as possible by avoiding excessive surpluses; constructive production to provide useful goods to foster human welfare throughout the world and give consumers better diets; durable production to keep our farms productive through conserving and rebuilding our soil resources; and efficient production so that farmers can make a good living while at the same time sell their products at moderate prices to maintain high consumption.

Efficient production is of first importance to the farmer if his farming enterprise is to be profitable. In the face of strong competition on every hand, he must adopt the most efficient methods and grow the most productive varieties of the crops best suited to his land. Names such as hybrid corn and Vicland oats are reminders of recent developments which have contributed to larger crop yields. This is equally true of improved varieties of legumes and grasses. Farmers growing these crops know that it pays to grow the best. They have found that improved crops are the key to larger returns. They know the importance of efficient production.

Legumes and grasses are essential crops for efficient production. They have contributed greatly to building the productivity of our farms in the past and we can use them effectively in the years ahead. Farmers shifting from wartime production to a peacetime program will reduce the acreage of cultivated crops and will put more land into hay and pasture. This is an excellent program, but it requires large supplies of legume seeds.

Seed Goals: It is recommended that national and State goals be developed to encourage the harvesting of more alfalfa, red clover, alsike clover, sweet-clover, and ladino clover seed in 1946. Larger quantities of white clover, some kinds of lespedeza, Kentucky bluegrass, and some other kinds of seed are needed and goals should be established in appropriate areas to reflect the need for these seeds. For some legume and grass seeds, the suggested goals indicate the advisability for smaller production.

Alfalfa: Production of 80 million pounds of clean alfalfa seed in 1946 is needed so that more alfalfa can be sown and stocks can be increased to a level which will facilitate seed distribution. The strong demand for alfalfa seed suggests the need for special efforts to gather more of it. This is especially the case in the northern area where winter hardness is an essential factor and where 60 percent more seed is needed.

Red Clover: A 1946 crop of red clover seed as large as or a little larger than the 1944 and 1945 crops is needed to provide enough seed for domestic use. There is now a larger acreage of red clover than usual as indicated by the heavy seedings during the past year, and with favorable weather and proper handling at least 95 million pounds of clean red clover seed could be harvested in 1946.

Alsike Clover: Production of 20 million pounds of clean alsike clover seed is needed in 1946 to meet domestic requirements. The 1945 harvest of 15,828,000 pounds of alsike clover seed was the largest in five years, but supplies of this seed continue short. A crop such as in 1940 is needed so that farmers can sow more alsike clover.

Ladino Clover: Continued demand from livestock producers for better pastures means further need of more ladino clover seed. It is recommended that about 1,600,000 pounds of seed be harvested in 1946, which is 50 percent more than the 1945 crop. The present high price for ladino seed discourages widespread use. Somewhat lower prices are likely to prevail as production more nearly equals the demand for this seed.

Sweetclover: Production of sweetclover seed in about the same quantity as before the war is desirable. This will enable farmers to use sweetclover more generally as a green manure crop for rebuilding soil fertility than was possible during the war. A crop about 40 percent larger than in 1945, or approximately 50 million pounds, would serve this purpose.

Lespedeza: Pasture and hay production in many States is dependent upon adequate supplies of lespedeza seed. Kobe lespedeza is being used more and more generally in the South, and some increase in seed supplies is needed to continue this expansion. Common lespedeza seed prices continue at a high level, indicating the need for more seed. Korean lespedeza seed is fairly plentiful and production in 1946 should be held at about the 1945 level. Production of Tennessee 76 and Sericea lespedeza seed should continue at about present levels.

White Clover: The demand for white clover seed far exceeds the supply and indicates the need for about 2 million pounds. It is recommended that the 1946 harvest be one-third larger than in 1945, or about the same as in 1943.

Bromegrass: The expanding use of bromegrass in hay and pasture mixtures indicates the need for larger crops of bromegrass seed. About 14 million pounds of seed are needed. A crop about 30 percent larger than in 1945 and about the same as in 1944 would provide adequate supplies. Attention should be directed toward increased production of the improved strains developed in the Central States.

Crested Wheatgrass: Production of about 10 million pounds of crested wheatgrass seed in 1946, or about twice as much as in 1945, would provide seed for continued expansion of this crop in the Northern Great Plains. The 1944 crop, estimated at over 17 million pounds, enabled farmers to seed a considerable acreage during the past year but more extensive seedings for range use are desirable.

Kentucky Bluegrass: A normal crop of bluegrass seed is needed in 1946 to provide more adequately for domestic and export trade. In the last three years only half crops have been harvested. Harvesting a crop of about 20 million pounds of clean seed is recommended.

Meadow Fescue: Reduced production of meadow fescue seed seems desirable so as to balance supply with demand. Almost half the seed produced in the last three years was exported and this outlet is likely to be much smaller in the future. Production of about 900,000 pounds is recommended.

Orchard Grass: Adjustment of orchard grass seed production to postwar requirements was accomplished in part during the past season, but it is suggested that the 1946 harvest of this seed be smaller than in 1945. A crop of about 3.5 million pounds is suggested or about three-fourths as much as in 1945. Lower prices are likely as the market for this seed returns to a domestic basis.

Redtop: Adequate supplies of redtop seed would be available if 1946 production were a little less than in 1945 and more nearly in line with the 1944 crop. Production of about 18 million pounds in Illinois and Missouri is recommended.

Sudan Grass: Production of about 50 million pounds of Sudan grass seed is recommended for 1946. This is about 85 percent more than in 1945 when production was small, chiefly because of drought in the Texas Panhandle area. There is a large carry-over of old seed but it is desirable that adequate supplies of seed be available for sowing as an emergency hay or pasture crop if such use should become necessary.

Timothy: The supply of timothy seed is plentiful. It is recommended that 1946 production be at least 15 percent smaller than the 1945 crop, or more nearly equal to the 1944 crop. The carry-over of old seed continues at a high level. Substitution of bromegrass and other crops in seeding mixtures has reduced the need for timothy seed below what could easily be produced.

Other Legume and Grass Seeds: Adapted legumes and grasses will have an important place in all farm and ranch programs during the next few years as we return to rebuilding and conserving our land resources. Only selected crops have been discussed in the foregoing paragraphs. There are many other very useful legumes and grasses which are important locally which can be used to good advantage. Attention should be given to encouraging seed production of these crops in proper relation to the market for seed. The development of marketing facilities will serve to assure producers a satisfactory outlet for their crop and is of itself an encouragement to harvest more seed.

Seed Production Programs: With the shift from wartime food production to conservation and rebuilding of soil resources, the time is here when more forage crop seed is needed. The suggested goals for seed production present a measure of the job before us. Local agencies can most effectively present this situation to farmers and it is only as farmers act to achieve the goals that adequate quantities of seed will be harvested.

Higher yields of seed result from careful harvesting and threshing. Early harvesting of the first crop for hay is one way to assure better yields of red clover seed. All clovers yield more seed when colonies of bees are placed near the field so as to improve pollination. These practices are important points to emphasize, together with acreage goals, in presenting the seed production program.

Particular attention should be given to increasing the quantities of seed of improved varieties of legumes and grasses. More feed can be produced and losses can be reduced when improved varieties are grown. The use of improved varieties is an essential step toward more efficient production on the farm.

Proposed Price Supports: It is contemplated that announcement will be made at a later date of a price support program for specified kinds of hay and pasture seeds produced in 1946.

LEGUME AND GRASS SEEDS: Suggested Goals for 1946

Crop	: 1946 Goal :		: Acreage :			: % Acreage Goal is of :		
	: : :		: 1945 : 1937- : :			: 1945 : 1937- : :		
	: Production: Acres: Indic. :		: 41 : 1944 : Indic.: 41 : 1944 :			: 41 : 1944 :		
	1,000 Lbs.	1,000	1,000	1,000	1,000	Percent		
Alfalfa	80,000	1,200	887.2	827.6	981.5	135	145	122
Red Clover	95,000	2,480	2,371.2	1,351.6	2,375.4	105	182	104
Alsike Clover	20,000	190	133.3	147.5	114.7	143	129	165
Ladino Clover	1,600	30	17.5	3.0	13.9	171	-	215
Sweetclover	50,000	430	277.2	416.3	259.2	155	103	166
White Clover	2,000	25	19.1	10.9	21.1	131	230	118
Lespedeza	200,000	1,300	1,153.7	704.5	1,318.6	108	157	95
Bromegrass	14,000	77	59.8	-	82.1	129	-	94
Crested Wheatgrass	10,000	100	48.9	-	164.9	204	-	60
Kentucky Bluegrass	20,000	-	-	-	-	200	-	-
Meadow Fescue	900	5	-	-	-	62	-	-
Orchard Grass	3,500	28	44.3	30.3	52.0	63	93	54
Redtop	18,000	260	268.0	300.0	255.0	97	86	102
Sudan Grass	50,000	145	69.5	179.8	159.1	209	81	91
Timothy	55,000	345	419.5	459.4	368.4	82	75	94

LEGUME AND GRASS SEEDS: Suggested State Goals for 1946

Seed, State and Region	: Acreage :				: % Acreage Goal is of :		
	: Suggested: 1945 : :				: 1945 : :		
	: 1946 Goal: Indicated: 1937-41 : 1944 :				: Indicated: 1937-41 : 1944 :		
	1,000	1,000	1,000	1,000	Percent	Percent	Percent
Alfalfa							
Ohio	20	10.0	16.2	50.0	200	123	40
Indiana	30	6.0	11.5	30.0	500	261	100
Michigan	115	24.0	99.0	115.0	480	116	100
Wisconsin	40	28.0	40.7	40.0	142	98	100
Minnesota	125	66.0	113.6	60.0	210	110	208
Iowa	15	6.0	17.9	11.0	250	84	136
North Dakota	40	28.0	17.8	30.0	142	225	133
South Dakota	45	35.0	11.6	32.0	128	388	141
Nebraska	130	117.0	64.2	67.0	111	202	194
Montana	110	83.0	45.0	100.0	133	244	110
Idaho	30	27.0	53.4	25.0	111	56	120
Wyoming	25	15.2	22.5	19.0	165	111	132
Washington	3	1.5	3.6	2.0	200	83	150
Oregon	10	4.0	9.0	5.0	250	111	200
N. Area	738	450.7	526.0	586.0	163	140	126
Kansas	165	163.0	95.0	142.0	101	174	116
Oklahoma	120	116.0	76.0	105.0	103	158	114
Colorado	50	28.0	18.5	30.0	196	270	167
Utah	50	35.0	41.4	35.0	143	121	143
C. Area	385	242.0	230.9	312.0	112	167	123
Texas	8	17.0	8.6	12.0	47	93	67
New Mexico	8	11.5	7.6	7.5	70	105	107
Arizona	35	44.0	33.8	44.0	80	104	80
California	20	22.0	20.7	20.0	91	97	100
S. Area	71	94.5	70.7	83.5	75	100	85
Other States	6	-	-	-	-	-	-
U. S.	1,200	887.2	827.6	981.5	135	145	122

LEGUME AND GRASS SEEDS: Suggested State Goals for 1946 (Cont'd.)

Seed, State and Region	Acreage				% Acreage Goal is of:		
	Suggested:	1945	1945	1945	1945	1945	1945
	1946 Goal:	Indicated:	1937-41	1944	Indicated:	1937-41	1944
	1,000	1,000	1,000	1,000	Percent	Percent	Percent
Red Clover							
New York	11	10.3	8.1	10.8	107	136	102
Pennsylvania	35	27.0	29.2	31.0	130	120	113
N.E.	46	37.3	37.3	41.8	123	123	110
Ohio	255	237.0	210.2	333.0	108	121	75
Indiana	345	328.0	238.0	345.0	105	145	100
Illinois	400	382.0	237.6	450.0	105	168	89
Michigan	200	199.0	121.2	221.0	100	165	90
Wisconsin	260	266.0	107.8	190.0	98	241	137
Minnesota	90	81.0	39.1	58.0	111	230	155
Iowa	500	507.0	139.1	441.0	99	359	113
Missouri	200	191.0	83.2	182.0	105	240	110
Nebraska	10	-	1.0 2/	-	-	1000	-
N.C.	2,260	2,191.0	1,177.2	2,225.0	103	192	102
Maryland	25	23.0	30.6	15.1	109	82	166
Virginia	20	15.4	16.0	7.0	130	125	286
Kentucky	25	22.0	20.2 3/	16.0	114	124	156
Tennessee	5	-	-	-	-	-	-
E. C.	75	60.4	66.8	38.1	124	112	197
Kansas	35	42.0	6.0	35.0	83	583	100
Montana	5	-	-	-	-	-	-
Idaho	25	25.0	41.2	21.0	100	61	119
Washington	5	2.5	4.3	2.5	200	116	200
Oregon	20	13.0	18.9	12.0	154	106	167
West.	90	82.5	70.4	70.5	109	128	128
Other States 1/	9	-	.9	-	-	1000	-
U.S.	2,480	2,371.2	1,351.6	2,375.4	105	183	104

Alsike Clover

New York	1	.6	1.2	.7	167	83	143
N.E.	1	.6	1.2	.7	167	83	143
Ohio	20	12.7	37.6	17.0	157	53	118
Indiana	10	6.6	9.6	6.0	152	104	167
Illinois	20	8.5	18.0	9.0	235	111	222
Michigan	15	7.5	11.6	10.0	200	129	150
Wisconsin	15	11.2	13.3	9.0	134	113	167
Minnesota	60	60.0	22.8	35.0	100	263	171
Iowa	10	8.0	5.2	5.0	125	192	200
Missouri	1	-	2.0	1.0	-	50	100
N.C.	151	114.5	120.1	92.0	132	126	164
Idaho	10	8.2	5.2	7.5	122	192	133
Oregon	25	10.0	21.0	14.5	250	119	172
West.	35	18.2	26.2	22.0	192	134	159
Other States	3	-	-	-	-	-	-
U.S.	190	133.3	147.5	114.7	143	129	166

1/ Includes Montana, Colorado, South Dakota, North Carolina, Tennessee, West Virginia, Delaware and New Jersey.

2/ 1937-40 average.

3/ Includes a small percentage of alsike clover seed.

LEGUME AND GRASS SEEDS: Suggested State Goals for 1946 (Cont'd.)

Seed, State and Region	Acreage			% Acreage Goal is of:		
	Suggested:	1945	1945	1945	1945	1945
	1946 Goal:	Indicated:	1937-41	1944	Indicated:	1937-41
	1,000	1,000	1,000	1,000	Percent	Percent
<u>Sudan Grass</u>						
Nebraska	5	5.0	7.7	11.0	100	65
Kansas	10	7.0	13.0	15.0	143	77
Oklahoma	10	6.0	4.2	7.0	167	238
Texas	65	24.0	85.8	72.0	271	76
Colorado	15	13.0	15.2	19.5	115	99
New Mexico	30	6.0	47.4	21.0	500	63
Oregon	-	3.0	1.0	4.0	-	-
California	10	5.5	5.5	9.6	182	182
U. S.	145	69.5	179.8	159.1	209	81
<u>Sweet Clover</u>						
Ohio	10	6.4	14.0	4.3	156	72
Indiana	10	5.9	8.1	5.9	169	123
Illinois	35	27.0	35.0	26.0	130	100
Michigan	10	4.8	10.2	5.0	208	98
Wisconsin	5	3.0	4.6	4.0	167	109
Minnesota	100	84.0	172.8	62.0	119	58
Iowa	20	14.0	38.0	15.0	143	53
Missouri	20	19.0	11.0	14.0	105	182
South Dakota	45	10.6	26.1	17.6	425	172
Nebraska	55	38.0	20.2	37.0	145	272
N. C.	310	212.7	340.0	190.8	146	91
North Dakota	35	14.0	29.4	9.0	250	119
Kansas	50	28.0	32.2	37.0	179	155
Montana	15	8.1	4.7	9.0	185	319
Wyoming	5	2.4	2.7	2.4	203	185
Colorado	15	12.0	7.3	11.0	125	205
West.	120	64.5	76.3	68.4	186	157
U.S.	430	277.2	416.3	259.2	155	103
<u>Ladino Clover</u>						
California	15	9.0	-	7.0	167	-
Oregon	10	6.2	3.0	4.9	161	333
Other States	5	2.3	-	2.0	217	-
U.S.	30	17.5	3.0	13.9	171	1000
<u>Redtop</u>						
Illinois	205	-	-	-	-	-
Missouri	55	-	-	-	-	-
U.S.	260	268.0	300.0	255.0	97	87
<u>Wheatgrass, Crested</u>						
U.S.	100	49.9	-	164.9	204	-
<u>Orchard Grass</u>						
Kentucky	15	24.0	16.8	23.0	62	89
Missouri	3	6.0	2.4	6.0	50	125
Virginia	10	14.3	11.1	23.0	70	90
U.S.	28	44.3	30.3	52.0	63	92

LEGUME AND GRASS SEEDS: Suggested State Goals for 1946 (Cont'd.)

Seed, State and Region	Acreage				% Acreage Goal is of:		
	Suggested:	1945	:	:	1945	:	:
	:1946 Goal:	Indicated:	1937-41:	1944	:Indicated:	1937-41	: 1944
	1,000	1,000	1,000	1,000	Percent	Percent	Percent
<u>Timothy</u>							
Pennsylvania	5	5.1	5.4	5.7	98	93	88
Ohio	30	34.0	51.4	38.0	88	58	79
Indiana	10	16.5	13.0	12.7	61	77	79
Illinois	25	29.0	53.0	30.0	86	47	83
Wisconsin	10	16.9	12.3	13.0	59	81	77
Minnesota	35	38.0	27.5	33.0	92	127	106
Iowa	180	217.0	216.6	181.0	83	83	99
Missouri	50	63.0	80.2	55.0	79	62	91
U.S.	345	419.5	459.4	368.4	82	75	94

<u>Bromegrass</u>							
U.S.	77	59.8	-	82.1	129	-	94

<u>Lespedeza</u>							
U.S.	1,300	1,153.7	704.5	1,318.6	113	185	99

FIELD SEEDS: Production, Stocks, Imports, Exports and Domestic Disappearance
(Clean Seed, 1,000 Pounds)

Year	: Production	: Stocks Total#	: Imports	: Exports	: Domestic Disappearance
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1. Alfalfa

1937-41	61,503	-	4,852	1,031	65,324
1939	73,381	5,589	3,376	515	66,427
1940	71,585	15,404	1,523	958	71,133
1941	50,303	16,421	11,508	912	64,104
1942	47,826	13,216	1,992	1,750	56,163
1943	57,192	5,121	2,812	401	58,638
1944	55,572	6,086	10,331	426	64,814
1945	56,754	6,749	7,500*	1,500*	64,503*
1946	80,000*	5,000*	3,000*	2,000*	76,000*
1947	-	10,000*	-	-	-

2. Red Clover

1937-41	73,929	-	1,854	372	75,411
1939	79,685	22,679	138	390	65,000
1940	99,185	37,112	1	785	95,319
1941	73,524	40,194	2	7,980	65,508
1942	49,722	40,232	-	4,049	62,135
1943	57,312	23,770	44	778	70,370
1944	94,602	9,978	4	1,073	90,825
1945	94,974	12,686	-	7,000*	82,660*
1946	95,000*	18,000*	-	5,000*	85,000*
1947	-	23,000*	-	-	-

FIELD SEEDS: Production, Stocks, Imports, Exports and Domestic Disappearance
(Clean Seed, 1,000 Pounds)

(Cont'd.)

Year	Production	Stocks Total#	Imports	Exports	Domestic Disappearance
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3. Alsike Clover

1937-41	15,845	-	272	500	15,617
1939	14,782	3,900	441	500	14,051
1940	19,216	4,572	-	2,200	15,291
1941	15,005	6,297	-	1,700	13,729
1942	11,868	5,873	-	2,800	12,202
1943	11,184	2,739	100	-	12,643
1944	11,154	1,380	-	5	11,833
1945	15,828	696	-	1,300*	14,224*
1946	20,000*	1,000*	-	1,000*	16,000*
1947	-	4,000*	-	-	-

4. Sweetclover

1937-41	50,331	-	4,941	200	55,072
1939	69,961	9,075	3,604	80	61,183
1940	46,088	21,377	500	600	53,524
1941	36,723	13,841	897	2	39,463
1942	29,070	11,996	2,193	6	34,391
1943	20,898	8,862	4,416	4	29,432
1944	31,050	4,740	9,029	-	37,252
1945	35,472	7,567	5,000*	-	38,039*
1946	50,000*	10,000*	6,000*	-	55,000*
1947	-	11,000*	-	-	-

5. Ladino Clover

1937-41 1/	227	-	-	-	-
1939	-	-	-	-	-
1940	-	-	-	-	-
1941	-	32	-	-	-
1942	380	206	-	-	522
1943	420	64	-	-	425
1944	790	59	-	-	640
1945	1,060	209	-	80*	889*
1946	1,600*	300*	-	100*	1,500*
1947	-	300*	-	-	-

6. Lespedeza

1937-41	116,725	-	-	-	116,725
1939	91,823	32,443	-	-	111,991
1940	111,770	12,275	-	-	120,082
1941	143,230	3,963	-	-	128,118
1942	136,190	19,075	-	-	146,453
1943	134,410	8,812	-	-	142,544
1944	225,700	5,678	-	-	186,027
1945	199,300	45,351	-	-	224,651
1946	200,000*	20,000*	-	-	200,000*
1947	-	20,000*	-	-	-

FIELD SEEDS: Production, Stocks, Imports, Exports and Domestic Disappearance
(Clean Seed, 1,000 Pounds)

(Cont'd.)

Year	Production	Stocks : Total#	Imports	Exports	Domestic Disappearance
7. Bromegrass					
1937-41	1,476	-	6,186	-	7,662
1939	-	-	-	-	-
1940	-	-	-	-	-
1941	-	-	-	-	-
1942	9,080	2,159	6,732	1,400	12,424
1943	8,470	4,147	5,979	-	15,236
1944	14,960	3,360	6,183	224	21,742
1945	10,480	2,537	6,000*	-	14,017*
1946	14,000*	5,000*	6,000*	-	20,000*
1947	-	5,000*	-	-	-
8. Orchard Grass					
1937-41	4,231	-	447	1,000*	3,678*
1939	4,298	900	288	1,000*	3,154*
1940	4,438	1,332	1	2,000*	3,398*
1941	5,656	373	-	3,000*	2,625*
1942	6,090	404	-	5,053	1,168
1943	5,880	273	-	4,389	1,207
1944	7,000	557	-	5,606	1,455
1945	4,872	496	-	2,000*	2,568*
1946	3,500*	800*	-	-	3,500*
1947	-	800*	-	-	-
9. Sudan Grass					
1937-41	62,536	-	-	-	62,536
1939	74,281	6,657	-	-	71,885
1940	48,558	9,053	-	-	37,035
1941	82,046	20,576	-	-	76,970
1942	37,164	25,652	-	200	54,106
1943	28,400	8,510	1,926	-	29,604
1944	68,500	9,232	89	2,000	31,187
1945	27,000	44,634	-	-	49,634*
1946	50,000*	22,000*	-	-	60,000*
1947	-	12,000*	-	-	-
10. Timothy					
1937-41	64,852	-	5	6,717	58,140
1939	59,337	36,707	16	10,673	56,097
1940	50,458	29,290	1	7,820	52,276
1941	52,396	19,653	-	11,978	44,638
1942	69,417	15,433	-	6,603	45,132
1943	69,903	33,115	-	7,527	54,747
1944	55,697	40,744	-	11,337	56,810
1945	66,339	28,294	-	6,000*	60,633*
1946	55,000*	28,000*	-	6,000*	57,000*
1947	-	20,000*	-	-	-
11. Kentucky Bluegrass					
1937-41	22,366	-	-	2,700	19,666
1939	9,205	10,856	-	465	14,060
1940	22,694	5,536	-	422	18,728
1941	24,716	9,080	-	2,637	20,894
1942	33,162	10,265	-	1,101	22,860
1943	10,576	19,466	-	1,704	16,787
1944	10,687	11,551	-	1,871	16,137
1945	8,806	4,230	-	1,000*	8,036*
1946	20,000*	4,000*	-	2,000*	15,000*
1947	-	7,000*	-	-	-

FIELD SEEDS: Production, Stocks, Imports, Exports and Domestic Disappearance
(Clean Seed, 1,000 Pounds)

(Cont'd.)

Year	Production	Stocks Total#	Imports	Exports	Domestic Disappearance
12. Wheatgrass, Crested					
1937-41	-	-	757	-	7,000*
1939	-	-	-	-	-
1940	-	-	-	-	-
1941	-	523	-	-	-
1942	12,305	987	1,010	635	12,804
1943	7,640	863	1,613	-	8,285
1944	17,280	1,831	611	-	16,046
1945	4,720	3,666*	1,000*	1,200	7,186*
1946	10,000*	1,000*	1,000*	500	10,500*
1947	-	1,000*	-	-	-
13. Meadow Fescue					
1937-41	645	-	33	-	678
1939	600	84	27	-	580
1940	1,400	131	15	-	1,290
1941	750	256	43	-	864
1942	1,225	185	7	807	428
1943	1,180	182	47	500	616
1944	1,445	293	-	850	623
1945	1,470	265	30*	600*	835*
1946	900*	330*	30*	200*	860*
1947	-	200*	-	-	-
14. Redtop					
1937-41	18,100	-	-	1,500	16,600
1939	17,700	6,910	-	310	16,146
1940	18,300	8,154	-	495	13,647
1941	18,500	12,312	-	1,210	15,765
1942	16,600	13,837	-	840	15,982
1943	10,700	13,615	-	554	14,174
1944 2/	17,300	9,587	-	989	18,449
1945	19,300	7,449	-	1,500	19,249*
1946	18,000*	6,000*	-	1,000*	19,000*
1947	-	6,000*	-	-	-
15. White Clover					
1937-41	685	-	1,161	-	1,856
1939	669	610	752	-	1,458
1940	835	573	81	-	1,134
1941	1,345	355	319	-	1,128
1942	1,890	891	.1	47	2,140
1943	2,310	594	97	270	2,134
1944	1,490	597	882	452	2,192
1945	1,480	325	400*	-	1,805*
1946	2,000*	400*	400*	-	2,400*
1947	-	400*	-	-	-

* Suggested

Commercial, farm and government stocks on June 30.

1/ Oregon only.

2/ First report including redtop seed produced in Missouri.

WINTER COVER CROP SEED GOALS FOR 1946

Winter cover crop seed requirements exceed the supply for crimson clover, hairy vetch and common ryegrass, but supplies of Austrian winter peas and other vetch are adequate. Considering the growing need for feed crops and for organic matter to maintain the productivity of soils throughout the country, it is necessary to provide more seed of those winter cover crops that are in demand.

Efficient and abundant production of food crops and of feed for producing eggs, milk and meat is dependent in large measure upon a level of soil productivity favorable to plant growth. That productivity is a composite of many factors, but an abundance of organic matter is one of the prime essentials. To provide this material, farmers make effective use of winter cover crops. These crops make considerable growth during the winter and thus provide a large tonnage of green organic matter to be plowed under in the spring before planting the summer crops. In this way soil nutrients which otherwise would leach away during the winter months are returned to the soil for use by food crops, the fertility of the soil is enhanced by the addition of nitrogen from the air when the cover crop is a legume, and the water-holding capacity of the soil is increased. Growing winter cover crops enables farmers to produce more food.

In addition to their important uses as winter cover and green manure, these crops furnish much hay and pasture in the South and also in the Pacific Northwest at a time of the year when other feed is scarce. These are competitive uses for the crop in the seed production area.

Greater use of winter legume cover crops is recommended in every State where they can be grown, but inadequate supplies of seed have been a handicap. Ryegrass and small grain are being used for winter cover in many fields but the acreage is small compared with the area that needs cover. It is estimated that there is need in the South for three times as much winter cover crop acreage as was seeded last year. A moderate increase in the use of cover crops is desired each year and, therefore, somewhat larger supplies of adapted seed than in recent years are provided for in the 1946 winter cover crop seed production goals.

Hairy Vetch is a very desirable winter legume and is adapted to practically all parts of the country. The estimated requirement for seed is 50 million pounds, three times as much as current supplies. The 1945 crop is indicated at about 15 million pounds, the smallest in six years, largely because of the small acreage available for seed production resulting from vetch bruchid infestation. Experimental results indicate that DDT offers effective control for this weevil and fair supplies of this insecticide may be available in time for treatment of the 1946 crop. Provided DDT becomes available, a considerable increase in production capacity would result from this treatment.

The national goal is 85,000 acres to produce about 20,000,000 pounds of seed. This quantity of seed is far short of requirements, but appears to be about all that can be achieved in 1946. Larger acreages for seed are needed in the South, particularly in Alabama, Arkansas, Kentucky and Tennessee where hairy vetch is used extensively as a cover crop. Some increase may be obtained in Michigan. Most of the increase, however, will have to come in Oregon, with a return to the 1943 or 1944 acreages of this crop if possible, but the acreage should by all means be larger than the present acreage.

Labor, production supplies and marketing facilities are adequate for achieving the proposed goal, but supplies of DDT must be available to farmers in Oregon by early spring so they will feel justified in leaving the hairy vetch crop for seed. Experimental results indicate that yields have been one-fifth higher where proper treatment for weevil has been made.

Common and Willamette Vetch seed requirements are larger than ever before but seed supplies, nevertheless, are adequate. It is estimated that 37 million pounds will be used in this country and that 7 million pounds will be exported. In the southern part of the Cotton Belt this vetch is a good substitute for hairy vetch, of which seed supplies are inadequate. Willamette vetch is more winter hardy than common vetch and, therefore, has a wider range of adaptability.

It is recommended that 1946 production of this seed be adjusted to prospective use so as to avoid accumulation of seed. A 40 million pound crop could be produced on 75,000 acres. This goal is about the same as the 1944 crop and about the same as the acreage to be harvested for seed this year.

Crimson Clover is an excellent winter legume for the area to the south of the Ohio Valley, along the East Coast and in the Pacific Northwest. Seed supplies are about two-thirds of what would be used each year if seed were more readily available. In the absence of abundant supplies of hairy vetch seed, crimson clover is the only winter legume sufficiently winter hardy to be used in parts of the South and in the North Atlantic Area.

Estimates of production and imports in 1945 indicate that about 16 million pounds will be available for seeding this fall. This is a little less than during the past two years. The carry-over of this seed is estimated at about 700,000 pounds. Imports may add about 1 million pounds of seed to our supply this year and 3 million pounds next year. It is estimated that about 22 million pounds of crimson clover seed should be harvested for use in 1946. Capacity for this larger production is available in the area where crimson clover is grown as a cover crop.

A goal of 88,000 acres of crimson clover to be harvested for seed is recommended. This would require increases of about 20 percent in the acreage in Tennessee and a larger percentage in other States where seed harvesting is becoming more important each year. This would provide larger supplies of locally-grown seed in much of the area greatly in need of winter legume cover crops and reasonably adequate supplies in all areas where crimson clover is adapted.

Facilities for producing the crimson clover seed suggested by the goal are generally available except as the expansion in the new areas may require more harvesting equipment and more seed-cleaning machinery.

Austrian Winter Peas are used as a winter cover crop on a larger acreage in the South than any other legume. This crop makes good growth under Cotton Belt conditions if planted early. Present seed supplies are adequate to permit widespread use. Requirements for the next two years are estimated at about the same level as during the past year, or about 75 million pounds. At present there is a carry-over of this seed more than sufficient for this year's planting, but the current crop is only a little larger than last year's small crop. This indicates the need for further increase in the acreage to be harvested for seed next year so as to maintain an adequate supply of seed for early planting. Production capacity and facilities for handling a larger crop are available. It is recommended that about 50,000 acres be harvested for seed in 1946.

Common Ryegrass is a good winter cover crop in many parts of the country and there is a need for adequate supplies of seed so as to permit early seeding of a larger acreage. Domestic requirements for this seed are estimated at about 32 million pounds or about 10 percent more than seedings during the past year. Export requirements for the coming year are relatively small. The present carry-over of seed is not large enough to permit early seeding of the desired acreage in eastern States.

The national goal is 90,000 acres of common ryegrass, producing about 30 million pounds of seed. In addition about 3 million pounds could be screened from other crops. The 1946 goal calls for a small increase over the current crop but production capacity and facilities are adequate.

Perennial Ryegrass is useful as a lawn, pasture, or cover crop seed. It seems that the acreage indicated for harvest this year is larger than necessary to produce the seed needed in the year ahead. About 4,000 acres probably would produce an adequate supply of seed in 1946.

Hungarian Vetch is grown primarily in the Pacific Northwest, but it is winter hardy throughout the Cotton Belt and does well on the heavier soils. Seed supplies are plentiful but the use of this crop is expanding slowly.

There is capacity to produce much more seed than current production, and facilities are available to handle more seed. Requirements are estimated at less than 4 million pounds and, therefore, production should be held to what can be used to good advantage in the seed production area, with a small reserve for other areas. Production in 1946 at about the same level as in 1945 seems desirable.

Purple Vetch is grown primarily in the Pacific Coast States. It is the least winter hardy of the vetches, and this precludes its general use in the Cotton Belt. Production should be adjusted to requirements in the area in which it is produced. If this year's large acreage is needed in the West, then the large acreage should be continued; otherwise a return to the 1943 acreage would seem desirable or about half the present acreage.

Blue Lupine continues to grow in popularity as a winter legume in the Gulf States. There is need for a large supply of seed so as to give opportunity for expanding the acreage of this crop. Production of seed in the consuming area is a big advantage which this crop provides. It is desirable that State goals be developed in the area where this crop is important, even though national goals are not presented for blue lupine.

Rough Pea (Wild Winter, Caley, Singletary and Peavine) is a useful cover crop in the South. Larger production of seed should be encouraged so as to permit expansion in the acreage of this crop. Home produced seed is a desirable feature which should be emphasized. State goals should be developed as a guide to production where adequate information is available.

1946 Purchase and Loan Program

Prices to farmers for winter cover crop seeds produced in 1946 will be supported by the Department of Agriculture through a purchase and loan program. Purchases from farmers of recleaned, bagged seed, which is fumigated when necessary, will be on the basis of the following prices per pound for top quality seed:

Hairy Vetch	12 cents
Willamette Vetch	6 cents
Crimson Clover	11.5 cents
Common Ryegrass	7.5 cents

Non-recourse loans will be available to farmers at the following rates per pound for top quality seed:

Austrian Winter Peas	3.5 cents
Rough Peas (Wild Winter, Caley, Singletary, Peavine)	5 cents
Blue Lupine	5 cents

The purchase prices and loan rates, except for blue lupine, are 1 cent per pound higher in Southern and East Central States to equalize shipping costs. Discounts are provided for seed which fails to meet basic specifications. Detailed schedules of purchase prices and loan rates will be announced at a later date.

Achievement of Goals

The goals for winter cover crop seeds presented in this report indicate the acreage needed to get the seed so essential to a proper use of winter cover crops. It is believed that this acreage is in proper balance with other crops grown in the area where these seeds are produced. An aggressive program, suited to conditions in each State, is needed to acquaint producers with the seed situation. The protection afforded by the price support program should be emphasized. Production adjusted to requirements is the first essential in a well balanced production program for winter cover crop seeds.

WINTER COVER CROP SEEDS

Prices 1938-1944, and Support Prices 1940-1946

Year	Season Average Price							
	Austrian	Vetch		Certified	Crimson	Common	Blue	Rough
	Winter	Hairy	Common	Willamette	Clover	Ryegrass	Lupine	Peas
	Peas							
	(Dollars per Cwt.)							
1938	2.30	6.13	2.85	--	9.00	3.60	--	--
1939	2.83	7.82	3.65	--	9.08	4.20	--	--
1940	2.95	7.30	3.00	3.25	9.49	3.10	--	--
1941	3.21	7.29	3.50	4.50	9.59	4.30	--	--
1942	4.90	9.87	4.90	6.00	10.79	5.00	--	--
1943	4.90	11.70	5.00 <u>1/</u>	--	10.52	7.90	7.60	--
1944	4.85	11.10	6.00 <u>1/</u>	--	12.80	7.00	6.00	--

Support Price								
1940	3.00	7.25	--	--	--	3.25	--	--
1941	3.00	7.25	3.00	4.50	8.50 <u>2/</u>	3.60	--	--
1942	5.00	10.00	5.00	6.50	10.00 <u>3/</u>	5.00	--	--
1943	5.00	10.00	5.00	6.50	10.00 <u>4/</u>	5.00	8.00	8.00
1944	5.00	11.00	6.00	--	11.50 <u>4/</u>	7.00	6.00 <u>5/</u>	8.00 <u>5/</u>
1945 <u>4/</u>	3.50 <u>5/</u>	12.00	--	6.00	11.50	7.50	5.00 <u>5/</u>	5.00 <u>5/</u>
1946 <u>4/</u>	3.50 <u>5/</u>	12.00	--	6.00	11.50	7.50	5.00 <u>5/</u>	5.00 <u>5/</u>

1/ Includes Willamette Vetch.

2/ Southern States \$10.00.

3/ East of Mississippi River \$11.50.

4/ In Southern and East Central States support is \$1.00 per cwt. higher for all except blue lupine seed.

5/ Loan.

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PRODUCTION GOALS

WINTER COVER CROP SEEDS

Type	1946 Goal		Acreage		% Acreage is of	
	Production Clean Seed	Acres	1937-41 Average	1945 Indicated	1937-41 Average	1945 Indicated
	1,000 lbs.	1,000	1,000	1,000	Percent	Percent
<u>Austrian Winter Peas</u>						
California	2,400	4.0	2.7 1/	3.0	148	133
Idaho	13,200	12.0	3.4 2/	11.0	353	109
North Dakota	--	--	.6 2/	--	--	--
Oregon	30,000	30.0	40.9	28.0	73	107
Washington	4,400	4.0	.6 1/	3.0	667	133
U. S.	50,000	50.0	44.5	45.0	112	111

1/ 3-year average

2/ 2-year average

Crimson Clover

Alabama	3,200	11.0	--	9.4	--	117
Georgia	1,800	8.0	--	5.5	--	145
Kentucky	1,800	8.0	2.1 1/	4.3	381	186
North Carolina	400	2.0	--	--	--	--
Oregon	600	2.0	1.9	2.0	105	100
Tennessee	13,000	52.0	16.9 2/	42.0	308	124
Other states	1,200	5.0 3/	6.7 1/	1.2	--	--
U. S.	22,000	88.0	20.7	64.4	425	137

1/ 3-year average

2/ 4-year average

3/ Mississippi 2.0, Virginia 3.0

Hairy Vetch

Arkansas	2,800	14.0	4.3 1/	10.8	326	130
Michigan	700	3.0	2.0	2.0	150	150
Oregon	13,500	55.0	59.7	47.0	92	117
Washington	800	3.0	3.3 1/	2.0	91	150
Other states	2,200	10.0 2/	--	--	--	--
U. S.	20,000	85.0	66.3	61.8	128	138

1/ 3-year average

2/ Alabama 2.0, Kentucky 2.0, Mississippi 2.0, North Carolina 1.0, Oklahoma 1.0, Tennessee 2.0

Common and Willamette Vetch

Oregon	36,500	70.0	23.5	92.0 2/	298	76
Washington	3,500	5.0	5.0 1/	6.0	100	83
U. S.	40,000	75.0	26.5	98.0	283	77

1/ 3-year average

2/ Since the May 19 report there have appeared indications that the acreage for seed in Oregon is about 72,000 acres. Revised estimate due August 24.

Common Ryegrass

Oregon	28,400	80.0	50.6	80.0	158	100
Other states	1,600	10.0 1/	--	--	--	--
U. S.	30,000	90.0	--	--	--	--

1/ Kentucky 1.0, Oklahoma 5.0, Tennessee 3.0, Other 1.0

Production and acreage data are from BAE reports of May 19; June 19; July 16; and August 4, 1945.

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WINTER COVER CROP SEEDS

Production, Stocks, Imports, Exports and Domestic Disappearance

Year	Production	Stocks June	Imports	Exports	Domestic Disappearance
(1,000 lbs.)					
<u>Hairy Vetch</u>					
1940	26,100	896	27		23,977
1941	27,390	3,046			27,596
1942	32,020	2,840		1,036	20,134
1943	24,480	13,690	3		31,469
1944	20,630	6,704			18,334*
1945	15,500*	9,000*			20,500*
1946	20,000**	4,000*			20,000**
1947		4,000**			
<u>Common and Willamette Vetch</u>					
1940	17,140				16,740
1941	17,160	400			15,460
1942	25,000	2,100		988	13,512
1943	26,800.	12,600			25,540
1944	39,900	13,860		11,000*	29,760*
1945	50,000*	13,000*		7,000*	37,000*
1946	40,000**	19,000*		3,000**	38,000**
1947		18,000**			
<u>Crimson Clover</u>					
1940	6,040	2,214			6,063
1941	9,380	2,191			8,007
1942	17,080	3,564		200	14,080
1943	13,880	6,364		240	18,581
1944	15,770	1,423		100*	16,393*
1945	14,410	700*	1,000*	10*	15,100*
1946	22,000**	1,000*	3,000*		24,000**
1947		2,000**			
<u>Austrian Winter Peas</u>					
1940	53,750	3,135			56,195
1941	37,100	690			36,147
1942	133,300	1,643			55,697
1943	150,500	79,246		10,172.	85,235
1944	43,300	134,339		6,760	72,879*
1945	45,000*	98,000*		3,000	75,000*
1946	50,000**	65,000*			75,000**
1947		40,000**			
<u>Common Ryegrass</u>					
1940	28,075	6,088	1		25,702
1941	24,000 1/	8,462	348	1,943	22,098
1942	30,000 2/	8,769	3	440	28,332
1943	23,000 3/	10,000	156		24,140
1944	31,000 4/	9,016	50	1,600	26,466*
1945	31,500* 5/	12,000*	50*	400*	31,150*
1946	33,000** 5/	12,000*			32,000**
1947		13,000**			

* Anticipated. ** Desired situation.

1/ Includes 3,000,000 pounds. 2/ Includes 3,120,000 pounds.

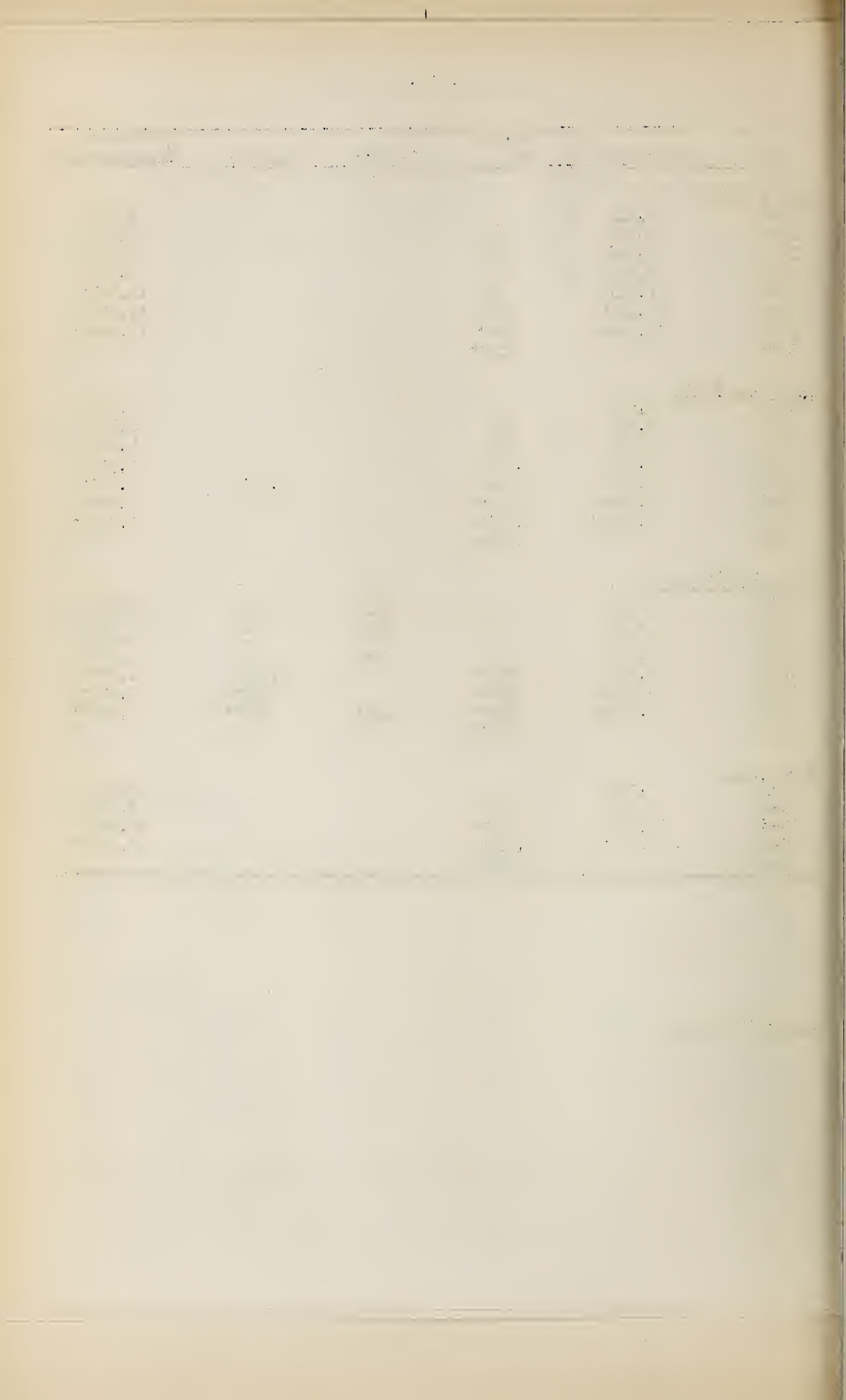
3/ Includes 2,600,000 pounds. 4/ Includes 3,600,000 pounds.

5/ Includes 3,500,000 pounds screened from other crops.

* 1945 production computed on basis of acreage indicated in May 19 report.

Year	Production	Stocks June	Imports	Exports	Domestic Disappearance
<u>Purple Vetch</u>					
1940	5,700				5,631
1941	4,310	60			4,299
1942	9,460	80			9,440
1943	8,450	100			8,473
1944	11,950	77			11,527*
1945	17,000*	500*			17,000*
1946	17,000**	500*			17,000**
1947		500**			
<u>Hungarian Vetch</u>					
1940	3,650				3,350
1941	2,400	300			2,400
1942	9,400	300			4,700
1943	4,500	5,000*			6,500
1944	3,000	3,000*		1,600	2,100*
1945	3,200*	2,300*			4,500*
1946	3,200**	1,000*			3,200**
1947		1,000**			
<u>Perennial Ryegrass</u>					
1940	1,720		294		2,014
1941	2,300		271	354	2,217
1942	3,300		41	1	3,340
1943	3,200		342		3,542
1944	3,600	300*		1,600*	1,800*
1945	4,500*	500*		500*	4,000*
1946	4,000**	500*	100*	100**	4,000**
1947		500**			
<u>Blue Lupine</u>					
1943	5,100				4,200
1944	7,100	900			7,600*
1945	11,200*	400*			10,400*
1946	15,000**	1,200*			15,000**
1947		1,200**			

August 10, 1945



Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

VEGETABLE SEEDS

Supplies of practically all vegetable seeds this year are sufficient and in some cases much more than sufficient for both domestic and export requirements. This is because of large yields from an increased acreage in 1944 which resulted in an unusually large carry-over from that crop and a continuing large acreage with mostly good yields in 1945.

Because of this situation, greatly reduced goals for 1946 are recommended for many items in order to avoid burdensome surpluses of such items. In some cases the goal represents only a small fraction of 1944 or 1945 production. It is not contemplated that Government contracts to meet export requirements will be placed for 1946 production. For this reason the commercial seed industry should accept growing contracts for export and provide in every way for the requirements for both domestic use and export.

VEGETABLE SEEDS: Suggested Goals for 1946

Kind of Seed	Goals for 1946					
	: Acreage :	Production :		: Percentage:		
	: 1945 1/ :	: :		: Production: of 1945 : Acreage		
	: :	: 1944 :	: 1945 1/ :	: Goals :	: Production: Goals	
		1,000 lbs.	1,000 lbs.	1,000 lbs.	Percent	
Beans, Dw. Green Pod	38,398	46,681	35,206	40,000	114	50,000
Beans, Wax	11,146 2/	5,643 2/	8,248 2/	7,000	85	11,500
Beans, Pole	6,482 2/	7,325 2/	6,786 2/	6,000	88	5,500
Beets, Garden	4,472	5,174	2,504	1,000	40	1,700
Beets, Mangel	1,504	832	1,864	200	11	300
Cabbage	1,748	1,993	774	300	39	650
Carrot	5,363	4,439	2,043	400	20	1,100
Cauliflower	131	140	31	10	32	25
Chard, Swiss	188	514	128	20	16	25
Corn, Hybrid	8,689	13,526	10,510	2,500	24	2,200
Corn, Varieties	5,344	9,317	6,776	6,000	89	5,000
Cucumber	7,567	1,181	1,607	1,200	75	6,000
Kale	185 2/	163 2/	105 2/	25	24	50
Leek	82 2/	100 2/	43 2/	1	2	3
Lettuce, Heading	4,045	732	776	500	64	1,800
Lettuce, Leaf	879	675	307	50	16	125
Lettuce, Romaine	136	72	52	60	115	150
Onion	8,975	2,503	2,530	800	32	3,000
Parsnip	166 2/	233 2/	135 2/	80	59	120
Peas, Smooth	49,432 2/	66,883 2/	50,420 2/	65,000	129	65,000
Peas, Wrinkled	101,200	91,916	88,193	80,000	91	90,000
Radish	5,856	2,828	2,854	800	28	2,900
Rutabaga	665	1,466	513	50	10	100
Spinach	1,183	2,974	622	1,400*	225	2,500
Squash, Summer	1,705	611	462	200	43	800
Squash, Winter	1,857	486	276	150	54	1,000
Tomato	12,345	474	436	400	92	12,000
Turnip	4,249	4,051	3,065	100	3	180

1/ Except as noted in footnote 2 the acreage and production figures shown in columns 1 and 3 are from the BAE September Survey, issued October 18, 1945.

2/ Since these items were not included in the BAE September Survey, the acreage and production figures from the March Survey, issued May 2, 1945, are given.



Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

GUM NAVAL STORES

Summary: The goal for production of gum naval stores during 1946-47 is 350,000 units (equivalent to 350,000 barrels of turpentine and 945,000 drums of rosin). Such volume of production of gum rosin and gum turpentine is needed, in addition to an estimated production of 360,000 barrels of wood turpentine and 1,000,000 drums of wood rosin, to meet estimated requirements for domestic consumption and exports and to restore presently depleted inventories of naval stores to a more normal state.

Gum naval stores production has declined during the war mainly as a result of labor shortages. Until recently, gum producers have been unable to pay wages competitive with wages in the lumber, pulp-wood, and war industries. This situation was improved by increasing the ceiling prices of gum rosin in August 1945, thus permitting an increase in the wages of gum naval stores labor. With wages at more nearly competitive levels and a more plentiful supply of labor in prospect, the gum industry should be able to attain production equal to the goal in 1946-47, provided the prices of gum naval stores remain at or near present levels.

Requirements: Requirements for gum and wood rosin and turpentine during the crop year 1946-47 are expected to approximate 1,800,000 drums of rosin and 625,000 barrels of turpentine. This would represent an increase of 300,000 drums of rosin and 50,000 barrels of turpentine over the estimated disappearance for 1945-46. In view of the probability that about 970,000 drums of wood rosin and 350,000 barrels of wood turpentine will be consumed domestically or exported during 1946-47, the requirement for gum products is expected to approximate 830,000 drums of rosin and 275,000 barrels of turpentine.

During the current year, consumption and inventory of rosin for civilian uses were drastically restricted by WPE Order M-387 until the order was relaxed by an amendment on August 18, 1945. It is anticipated that the order will be rescinded or at least further relaxed within a reasonably short time. Exports of rosin have been under quota control. When the controls are relaxed domestic consumption and exports probably will increase substantially. Consumption of turpentine has not been restricted, but inventories are approaching record lows and are likely to be the smallest in many years by April 1, 1946.

GUM NAVAL STORES: Estimated Production, Disappearance, and Carry-Over

Item	:Turpentine (50 gal. bbl.):			Rosin (drums of 520 lbs. net)		
	Gum	Wood	Total	Gum	Wood	Total
Carry-over 4/1/45	168,011	34,535	202,546	265,881	122,385	388,266
Production 1945-46	260,000	250,000	510,000	700,000	750,000	1,450,000
Total Supply	428,011	284,535	712,546	965,881	872,385	1,838,266
Disappearance	340,000	235,000	575,000	737,615	762,385	1,500,000
Carry-over 4/1/46	88,011	49,535	137,546	228,266	110,000	338,266
Production 1946-47	350,000	360,000	710,000	945,000	1,000,000	1,945,000
Supply	438,011	409,535	847,546	1,173,266	1,110,000	2,283,266
Disappearance	275,000	350,000	625,000	830,000	970,000	1,800,000
Carry-over 4/1/47	163,011	59,535	222,546	343,266	140,000	483,266

Production Capacity: Timber resources are adequate to permit production by the gum naval stores industry of at least 630,000 units, or the equivalent of 630,000 barrels of turpentine and 1,700,000 drums of rosin. Neither labor supply nor available equipment, however, will permit a close approach to this volume of production during 1946-47. Furthermore, the market would not absorb such quantity of gum naval stores in addition to the prospective supply of wood naval stores. Under the circumstances, it is not believed that the practicable capacity for gum naval stores production during 1946-47 is much, if any, in excess of 350,000 units (equivalent to 945,000 drums of rosin and 350,000 barrels of turpentine) unless prices and wages are substantially increased. This would be about 90,000 units (equivalent to 90,000 barrels of turpentine and 245,000 drums of rosin) greater than the latest estimate of production for 1945-46.

Suggested Goal: The suggested goal for gum naval stores production in 1946-47 is the practicable capacity of 350,000 units. This goal is fixed with reference to the needs for domestic consumption and exports of naval stores to anticipated production of wood naval stores (1,000,000 drums of rosin and 360,000 barrels of turpentine) and to prospective price, labor, and cost factors in the gum naval stores industry.

GUM NAVAL STORES: Yield and Production

Period	Crops Worked	Yield	Production 1/
	10,000 trees	Units per crop 2/	Units
1937-41	9,382	41.8	412,900
1942	8,470	38.0	321,900
1943	6,700	43.0	288,382
1944	6,200	39.6	245,200
1945 (indicated)	6,700	38.8	260,000
1946 (goal & capacity)	8,200	42.7	350,000 3/

- 1/ In 1944, production was distributed approximately as follows:
Georgia, 68 percent; Florida, 24 percent; Alabama, 6 percent;
other States, 2 percent.
- 2/ Each unit is 50 gallons of turpentine and approximately 1,400 pounds of rosin.
- 3/ Goal is approximately 85 percent of 1937-41 production and 135 percent of 1945 indicated production.

Labor and Production Supplies: Shortages of labor have constituted the main obstacle to gum naval stores production during the war. As shown above, there was a progressive decline in the gum naval stores production from prewar through 1944. Although labor shortages have affected virtually all industries, they have been particularly acute in the gum naval stores industry because of the low wages customarily paid and the high percentages of manual labor required by such industry. It was not until the price ceilings for gum rosin were increased in August 1945 that the industry could pay wages approaching those paid in lumbering, pulp-wood, and other competitive industries. As a result the industry has been unable during the war to work a normal croppage of trees or to work fully the croppage in operation. With the end of the war and demobilization of the armed forces, labor is expected to be more plentiful and an increased production for 1946-47 is considered probable. Trucks and other equipment used in the gum naval stores industry have been short but of less importance than lack of labor in curtailing production. Lack of equipment should not be a controlling factor in 1946-47.

Marketing Facilities: Ample facilities for marketing gum rosin and gum turpentine are available and facilities for marketing gum as such are constantly being increased through additions to the number of central processing plants, which to a great extent have replaced fire stills throughout the naval stores belt.

Recommendations for Goal Achievement: With the end of the war, price factors and competitive conditions will be dominant in determining the volume of production of both gum and wood naval stores. It is believed that wood naval stores production will be at least 1,000,000 drums of wood rosin and 360,000 barrels of wood turpentine. The goal of 945,000 drums of gum rosin and 350,000 barrels of gum turpentine appears justified provided prices remain at or near current levels. Gum naval stores production can be encouraged by (1) permitting increased utilization of rosin, as increased production becomes available through relaxation of the controls over domestic consumption and exports, and (2) maintaining the current differential between gum and wood rosin prices through continuing in effect the existing price ceilings.

Prices: Rosin has been selling at ceiling prices throughout the current year. The present gum rosin price of the average (K grade) is \$6.80 per hundred pounds or 55 percent above the current parity of \$4.37 per hundred pounds. Ceiling prices for wood rosin average about \$2.00 per hundred pounds below the prices for gum rosin. There are no ceiling prices on gum turpentine, which is selling currently at 80 cents per bulk gallon as compared with a parity of 80.4 cents. The wood turpentines, however, are controlled under the maximum price regulations. The ceiling for steam-distilled turpentine is 68 cents per bulk gallon at the processing plant and the ceilings for sulphate turpentine are the highest prices charged by the individual producers in March 1942. Gum turpentine and gum rosin are supported by a loan program, the support prices being \$3.89 for K grade rosin and 72 cents for turpentine, equal to 90 percent of the April parity. It is anticipated that a support program not in excess of 90 percent of parity will be available for 1946 production.

In view of the short current supplies of both gum and wood rosin and turpentine and the shorter supplies in prospect for the end of the current year, it is believed that prices should remain fairly strong during 1946-47. If the ceilings on rosin were removed, however, the prices of gum rosin might move down and the prices of wood rosin move up so as to narrow the differential between the two, which is currently about \$2.00 per hundred pounds.

Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

BEES

An increase is proposed of 8 percent in the number of colonies of bees in the country. The need for more honeybees has become increasingly evident during recent years. This need is not primarily for the production by the bees of honey and beeswax, important though they are, but for the activity of the bees as pollinating agents, which has a value conservatively estimated at 10 to 20 times the value of the honey and beeswax they produce. The honeybee is the only pollinating insect whose numbers and locations can be controlled by man.

As stated in Department Bulletin E-584, issued in December, 1942, and headed "The Dependence of Agriculture on the Beekeeping Industry": "Although the beekeeping industry produces in excess of 200 million pounds of honey and 4 million pounds of beeswax annually, these are merely byproducts and its principal role is in the pollination of the many agricultural crops for the production of seed and fruit. At least 50 agricultural crops depend upon honeybees for pollination or yield more abundantly when bees are plentiful." These include 15 commercial fruits, more than that number of important vegetables, and most of the leading legumes. The title of Ohio Extension Bulletin 253, issued in April 1944, "Honeybees Increase Clover Seed Production 15 Times," summarizes the attitude of many seedsmen regarding the importance of bees to the pollination of clovers.

Except in fruit areas, however, beekeepers are rarely compensated for the pollinating value of their colonies, but must depend upon the sale of the honey and beeswax the bees produce. At present, wholesale lots of honey are selling at twice pre-war levels and demand for it cannot be filled, but when sugar is again in adequate supply beekeepers will face a falling market for honey. In view of this it is suggested that the bee and honey industry consider possible methods of securing direct payments by seed producers to beekeepers to compensate for a portion of the pollinating work done by their bees.

In the accompanying tabulation, the proposed increase of 8 percent in the number of colonies of bees is broken down by States. In developing the indicated State percentages of colony increases, the 1946 goals for legumes were used as a primary base. The need for bees in fruit-producing States was also considered. It was further realized that as other pollinating insects decrease in numbers, due to spray poisoning, clean cultivation, or other factors, honeybees are needed in larger quantities than in former years, simply to maintain previous seed output. Attention was given to the fact that while it is of economic importance to the agriculture of the country that the density of the honeybee population increase as much as possible in States where insect-pollinated fruit or seed crops are produced, yet at present it requires profitable honey production to assure an increase in colonies of bees. For example, although findings in a recent 3-year study on red clover in Henry County, Ohio, by Department of Agriculture agents and others (Ohio Extension Bulletin 253) show that 82 percent of the pollination of red clover blooms was done by honeybees, yet the nectar gathered in red clover fields is often light, especially in wet seasons. In the absence of compensation directly connected with the pollination service, therefore, States producing red clover were given less consideration in developing the goals for bees than their acreages alone would warrant. For other States, such as Iowa and the Dakotas, in which production of honey has proved especially profitable in the past year or so, larger increases have been proposed than seed goals estimates alone would suggest.

The nectar sources of all States would support a greatly increased bee population. From the standpoint of effective agricultural economy, most States should have more colonies of bees than the proposed goals.

BEES: Suggested State Goals for 1946

State	: 1946 Goal :	NUMBER		: % 1946 Goal is of	
and	: 1940-1944 :	1945	: 1940-1944 :	1945	
Region	Number	: Indicated :		: Indicated	
	--	1,000 Colonies	--	Percent	Percent
Maine	7	6	7	117	100
N.H.	3	3	3	100	100
Vt.	8	8	8	100	100
Mass.	18	16	18	113	100
R.I.	1	1	1	100	100
Conn.	20	19	17	105	118
N. Y.	229	193	209	119	110
N. J.	30	26	27	115	111
Pa.	191	181	181	106	106
N.E.	507	453	471	112	108
Ill.	221	200	201	110	110
Ind.	167	149	162	112	103
Iowa	275	186	233	148	118
Mich.	212	172	198	123	107
Minn.	327	231	272	142	120
Mo.	181	148	176	122	103
Nebr.	65	44	55	148	118
Ohio	343	291	326	118	105
S. Dak.	21	16	16	131	131
Wis.	222	177	202	125	110
N.C.	2034	1614	1841	126	110
Del.	3	3	3	100	100
Md.	27	24	26	112	104
Va.	140	124	135	113	104
W. Va.	117	100	112	117	104
N. C.	187	172	177	109	106
Ky.	207	148	202	140	102
Tenn.	209	155	204	135	102
E. C.	890	726	859	123	104
Ala.	195	133	185	147	105
Ark.	76	72	71	106	107
Fla.	192	157	182	122	105
Ga.	229	173	219	132	105
La.	79	60	75	132	105
Miss.	75	58	70	129	107
Okla.	57	41	52	139	110
S.C.	71	53	66	134	108
Tex.	241	206	231	117	104
SOUTH	1215	953	1151	127	106
Ariz.	73	73	69	100	106
Calif.	510	426	470	120	109
Colo.	85	66	75	129	113
Idaho	160	130	150	123	107
Kansas	54	38	51	142	106
Mont.	60	37	50	162	120
Nev.	14	13	14	108	100
N. Mex.	19	16	18	119	106
N. Dak.	32	22	22	145	145
Oreg.	78	54	66	144	118
Utah	58	51	53	114	100
Wash.	74	63	69	117	107
Wyo.	40	32	37	125	108
WEST	1257	1021	1144	123	110
U.S.	5903	4767	5466	124	108

MAPLE SUGAR AND MAPLE SYRUP

The 10 principal maple sugar and maple syrup producing states are in the N. E. Atlantic Area and in the Great Lakes Region. Vermont produces about 40 percent and New York about 30 percent of the total U. S. production.

During the period 1933-42, the average annual U. S. production was 738,000 pounds of sugar and 2,579,000 gallons of syrup. Production in 1944, a year of normal production, was 565,000 pounds of maple sugar and 2,568,000 gallons of syrup. Production in 1945 was 251,000 pounds of sugar and 990,000 gallons of syrup. This low production was due to the high temperatures prevailing during the sap-gathering period causing a low sap production.

The number of maple trees tapped in the principal producing states has decreased from an annual average of 11,057,000 during the period 1933-42 to 8,681,000 in 1944.

Imports from Canada during 1944 were 3,882,751 pounds of sugar and 163,495 gallons of syrup.

An increase in the 1946 production of maple sugar and syrup will be helpful since there is a scarcity of sweets for use in making a variety of foods.

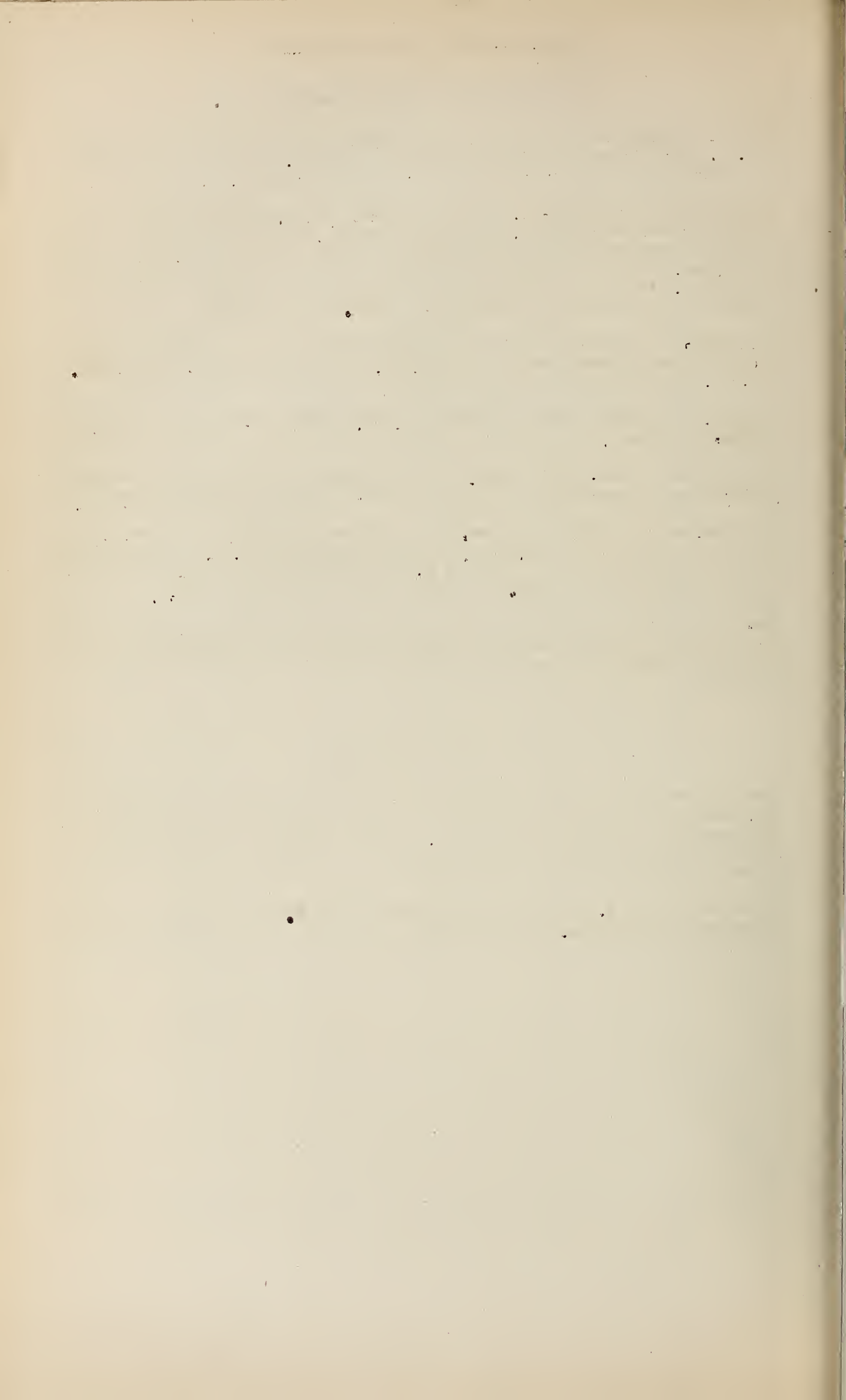
No State goals for 1946 are recommended because no sizeable increase over 1944 production can be attained. By encouraging farmers to tap all trees in condition for tapping some increase over 1944 production may be realized if weather conditions are favorable during the sap gathering period.

To increase the production of maple sugar and syrup so that production would be sufficient to supply domestic requirements, it would be necessary to increase the number of sap-producing trees. This would require a long-time program.

OIL OF PEPPERMINT

From information currently available, it is indicated that approximately 1,200,000 pounds of oil of peppermint could be constituted as the total requirement for the 1946-47 crop year. A normal acreage of approximately 40,000 acres should meet these requirements. Production in 1945 is estimated to be somewhat above this amount.

There have been no official goals established for oil of peppermint production and none are recommended for 1946.



Suggested
Production Goals
1946

NOT FOR PUBLICATION
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DAIRY

Summary: Suggested milk production goal for the U. S. in 1946 is 120.5 billion pounds. This figure is about $1\frac{1}{2}$ billion pounds greater than milk production in any year prior to 1945, the same as the goal established for 1945 and about 2.5 billion pounds less than estimated production for 1945. Assuming a national income in excess of 130 billion dollars, requirements for dairy products for the domestic civilian economy are expected to be sufficient to absorb the milk diverted to military and lend-lease purposes during the war. The all-time record of production achieved in 1945 is largely attributable to extremely favorable weather. With fewer milk cows in 1946, the goal is believed to approximate production capacity.

Considerable adjustment will be necessary in the disposition of milk in 1946. Lower requirements for evaporated milk, Cheddar cheese, dry ice cream mix and dry whole milk will require that milk be diverted to fluid milk, cream, ice cream, and perhaps butter. The anticipated adjustments will result in further expansion of nonfat dry milk solids production which was nearly doubled during the war. Finding outlets for these dry milk powder products will constitute one of the principal problems in 1946. Increased production of other skim milk products such as casein, skim milk cheese, and animal feed powder, as well as some return of deliveries of farm separated cream, will help but will not solve the problem.

By and large, production and marketing facilities are expected to be adequate. The indicated average number of milk cows for the year is 25.5 million head. This represents a decline of about 2 percent from the 1944 peak. Although a good share of the reduction in cows has already occurred, the decline affords an opportunity for needed culling. Emphasis is placed on efficient milk production with better stock and feeding of high quality roughages. Nevertheless, the achievement of the goal is dependent upon high milk production per cow which cannot be reached unless heavy concentrate feeding is continued. Feed supplies are expected to be generally adequate.

Requirements: Requirements for milk and dairy products in 1946 for domestic civilian utilization will be considerably greater than actual consumption in recent years. Rationing, set-aside, and limitation orders restricted civilian consumption during the war to divert milk to war purposes. With the removal of these restrictions and the curtailment of overseas and military requirements for dairy products, effective civilian demand is expected to be sufficient to absorb the milk that was being diverted to war uses. During the past 3 years these unusual wartime demands have taken from 15 percent to 20 percent of the milk produced.

While various estimates are available showing civilian requirements for milk far above the highest levels reached during the war, it is physically impossible to increase production significantly in 1946, and any increase would have to be at considerably higher costs.

Requirements for milk in any event will far exceed prewar production levels. Average milk production in the U. S. in the 5 prewar years, 1936-40, was 105.3 billion pounds or 805 pounds per capita annually. Estimated production in the 5 years, 1941-45, averaged 118.9 billion pounds, or 863.5 pounds per capita (based on total population). Peak production has been attained in 1945 and production for this year is expected to reach 123 billion pounds, or 872.1 pounds per capita. These latter production records have been achieved under forced draft with favorable weather conditions and with milk production subsidized at levels approaching 450 million dollars a year. Obviously, postwar

requirements are of lesser urgency than those which existed under conditions of war, and unusual incentives such as high subsidies are not expected to continue indefinitely.

Even without any substantial change in total milk requirements, postwar requirements for particular dairy products will be considerably altered in the transition to peacetime conditions. Requirements for concentrated nonperishable forms of dairy products suitable for long distance movement and for consumption under adverse circumstances will be less, while greater emphasis will be placed upon perishable products for immediate consumption. Thus, production of dry whole milk, dry ice cream mix, evaporated and condensed milk will need to decline, and milk formerly used for these products must be diverted to such items as fluid milk, cream, and ice cream. For the 3 prewar years, 1938-40, the four principal manufactured whole milk products (cheese, evaporated milk, condensed milk and dry whole milk) took 12 percent of milk production. By 1945, they were taking 19 percent.

Another significant adjustment involves the fuller utilization of milk solids-not-fat. Prior to the war, domestic consumption of this portion of milk was gradually increasing, particularly with respect to human consumption of non-fat milk powder. Production of nonfat dry milk solids was greatly accelerated during the war, reaching a total production of 583.8 million pounds in 1944, compared with a 5-year (1938-42) average of 362.1 million pounds per year. In 1945, this production is expected to exceed 640 million pounds, and conditions in 1946 will permit still further expansion. A high proportion of the wartime production was used for war purposes. Shipments abroad and military uses in 1943 amounted to 270 million pounds or 52.9 percent of total production and in 1944, they were 302 million pounds or 51.9 percent of production. Overseas shipments may reach 300 million pounds in 1946. Nevertheless, greater dependence will have to be placed upon domestic civilian outlets for the utilization of the expanded production of dry milk products. Farmers have shifted heavily to the delivery of whole milk instead of farm separated cream. From the 1938-40 average to 1945, milk production increased about 16 billion pounds or 14 percent, while deliveries of milk at wholesale increased 24 billion pounds or 55 percent. Now that milk drying facilities have been established and more farmers have organized their farms for whole milk sales, there will be a strong tendency to maintain nonfat dry milk production even with declining prices. Consequently, the risk of supplies exceeding requirements is greater with these products than any other class of dairy products.

Increased production of nonfat dry milk solids is expected to occur despite greater requirements and utilization of skim milk for the manufacture of casein, animal feed powder, and perhaps skim milk cheeses. As a result, some shift back to the use of fluid skim milk for livestock feeding on farms will be desirable in hog and poultry producing areas especially where low grade powder is produced.

Production Capacity: The highest demonstrated capacity for milk production has become apparent in the current year with an estimated output of 123 billion pounds of milk compared with the highest previous peak of 119.2 billion pounds for 1942. At least 2 billion pounds of the greater production in 1945 is attributable to favorable weather--pasture conditions have been better than in any year of the past 18 years except for 1942. The remainder is due to heavier grain feeding, abundant hay supplies, and a relatively large number of milk cows.

The actual 1945 production does not fully reflect current maximum capacity because the percentage of cows milked tended to be low, probably as the result of labor scarcity. Nevertheless, it is evident that milk production capacity will be lower in 1946. This is true because cow numbers have been declining since the peak was reached in 1944 and because a repetition of the

favorable weather cannot be relied upon. The capacity estimate of 123 billion pounds for 1946, arrived at by total State Production Adjustment Study estimates, was based on continued wartime conditions and cow numbers considerably (3 percent) higher than now are in prospect.

Except for the lower cow numbers and possibly less favorable weather, no other factors appear likely to place physical limitation on milk production.

The entire agricultural plant has expanded greatly in its productive capacity and most of the factors that brought about the very high levels of feed grain and hay production in the war years are permanent so that large feed supplies can be expected to be the general rule in years to come. All other livestock products have problems in adjusting to postwar needs. The capacity for producing a single product such as milk cannot be considered separately from other livestock products and feed. The over-all picture is definitely one of continued high production with the products that have an advantage in returns tending to increase faster than others. Dairy production will continue as the major farm enterprise in many areas of the country where abundant growth of good roughage can be produced and where family labor is available. The capacity for increasing milk production through selection and improvement of dairy cows and greater reliance on good roughages is very great. We can expect full utilization of resources in all areas. This will assure a continued long-time upward trend in milk production.

Suggested Goal: The suggested production goal for the U. S. in 1946 is 120.5 billion pounds of milk. This goal is the same as the 1945 goal and although it is less than actual production in 1945, it is well above the production in any previous year. The accomplishment of this goal will require a distinct effort on the part of dairymen.

Emphasis on greater efficiency of milk production will be a requisite part of the goals program for the coming year. With fewer cows and greater risks of declining returns than existed so long as the war lasted, greater reliance will have to be placed upon the use of the most economical feeds such as hay and pasture. Somewhat higher average-producing ability of cows due to culling and the retention of better producing cows will in part offset the possible lower rate of grain feeding.

An average of 25.5 million milk cows for the year is expected for 1946. This represents a decline of less than 1 percent from the estimated 1945 average of 25.7 million cows. The reduction, much of which has already occurred, will involve culling of low production cows with the selection of better producers for retention in the herds. Such culling and selection is appropriate at this time, if it does not entail a severe liquidation of herds.

The number of heifers and calves held for herd replacements should be sufficiently large to maintain total cow numbers at or near an average of 25.5 million.

Milk Cow Numbers: The decrease of about 2 percent in cow numbers from the 1944 average is expected to be fairly uniformly distributed over the country. Since 1944 represented the peak in cow numbers, adjustments are figured from that year. By regions, the smallest decrease would be in the Northeast and the largest in the West. The 1 percent decrease in the Northeast is the result of an indicated 2 percent decrease in Maine and southern New England with Vermont and New York decreasing 1 percent, and New Jersey and Pennsylvania continuing 1944 numbers.

In the North Central region, present indications point to a decrease as large as 6 percent in some of the butterfat states like Nebraska and South Dakota, 1 or 2 percent decrease in Illinois, Minnesota, and Michigan and Ohio, and maintaining 1944 numbers in Indiana and Wisconsin.

The East Central region would show a rather uniform decrease of 1 or 2 percent except for Tennessee, where it would be 3 percent.

Arkansas, Florida, Louisiana, and Mississippi would maintain 1944 numbers while in other Southern region states the decrease would be from 1 to 2 percent except in Texas, where it would be 4 percent.

The Western region presents a somewhat varied pattern with decreases in cow numbers reaching 6 percent in Colorado and Montana, and 4 percent in North Dakota, Washington, and Oregon. Other States would decrease from 1 to 3 percent except California, Arizona, Nevada, and New Mexico, which would maintain numbers at or slightly above 1944 levels.

Production Per Cow: Achievement of the 1946 milk production goal is dependent to a large degree upon the rate of milk production per cow. The suggested goal requires a national rate for 1946 of 4,725 pounds per cow or about 15 pounds less than the high levels of 1941 and 1942, which were the highest on record except for 1945. Compared with the presently indicated 1945 level, the required production would be 61 pounds less per cow.

It will be necessary to obtain a production per cow about 3 percent above the 1937-41 average to reach the proposed goal. Suggested goals require production per cow for 1946 about 4 percent above 1944 in the North Central and East Central regions; 3 percent above in the Southern region; 2 percent in the Northeast region; and 1 percent in the Western region. For most states, these rates of production per cow are slightly below the highest levels reached in 1941 or 1942.

Suggestions for individual states take into consideration trends in cow numbers and production per cow in recent years, available feed supplies, and anticipated competition between the production of milk and other agricultural commodities in 1946.

Total Milk Production: If the number of cows kept in 1946 follows closely the present indications and the estimated production per cow is attained, total production would be sufficient to meet the goal. The increase in milk production in the East Central and North Central regions will be somewhat greater than the national average of about 1 percent from 1944 to 1946. In the North East and South total production will be about 1 percent above that in 1944 and in the West slightly under the 1944 level.

Labor and Production Supplies: Some improvement in the supply and quality of labor available to farmers is expected in 1946 compared with 1945. The release of men from the armed services, together with the return to farm areas of some men engaged in war industries, is expected to supply sufficient labor to offset the exodus of farm laborers resulting from the relaxation of labor controls in effect during the war. Also, able men should be available to replace some of the wartime working force that was composed to a considerable extent of children, older men, and women. Thus, the efficiency of the labor force should be improved even though the net increase in farm employees may not be great, and labor should prove to be less of a limiting factor in milk production than was true in the past 3 years.

Feed supplies will be generally adequate during the first 3 quarters of 1946 to meet the suggested milk production goal if pasture conditions are normal or better. The supply of feed grains on October 1, 1945 was slightly larger than the supply a year earlier with the location of the supplies favoring milk production because of the good feed grain crops in the North East, East Central, and East North Central States. The amount of wheat available for feed will be much less than in 1945, when feed wheat made up about 6 percent of the concentrates fed. Present indications point to a somewhat lower supply of protein

feeds. Also, the large volume of soft corn will result in a continued tight situation on corn for use in mixed feeds and for shipment into feed deficit areas. The supply of concentrates available for dairy cows will be affected greatly by what happens to poultry production. The feed situation will be much easier if suggested poultry goals are met and production is decreased substantially.

The hay supply situation is very good though quality is low in many areas due to excessive rains during haying.

What happens during the third quarter of 1946 depends largely upon the outturn of feed crops next year but production can be expected to provide adequate supplies during the fall season of 1946, barring serious drought.

Production supplies are expected to be generally adequate. Farm machinery will be produced in greater quantities and varieties. Fertilizers should be more readily available than in any of the previous 4 years. Lumber supplies will be about twice as great as in this year. Dairy supplies such as cans, pails, coolers, and strainers will become more plentiful, and existing shortages should be eased during the year. Soaps may be short of total demand, but synthetic detergents will be available in greater quantities. Except for a few items like binder twine, general farm supplies will be fairly plentiful.

Marketing Facilities: Processing facilities are adequate to handle expected supplies of milk for the country as a whole. A considerable backlog of replacement requirements for milk processing machinery and equipment has accumulated during the war. New equipment may not meet total demand but replacement parts will be generally available and will help to keep the dairy manufacturing plants in continuous operation. A number of older plants which have been kept in production during the war period may be shut down as the strain on total milk capacity is reduced.

Current shortages of milk cans, bottles, and containers are expected to be relieved in 1946. Manufacturers of milk cans are reported to have ample capacity, and barring major stoppages in connection with the negotiation of new labor contracts, they should be able to supply all requirements during the coming year. With the possible exception of tin, materials used in can production will be readily available. Manufacturers of paper and glass milk containers are likewise expected to be able to supply 1946 requirements.

Transportation facilities are expected to be adequate. A large proportion of trucks must be replaced and many others will require new tires or replacement of parts. Supplies of new trucks as well as tires and parts should improve as the year progresses, and no significant supplies of milk should fail to reach processing plants for lack of normal transportation facilities. Sufficient trucks and transportation facilities to distribute milk at retail on a prewar basis may not be available. Where these conditions exist it is anticipated that every-other-day delivery of fluid milk and similar devices for conserving transportation will continue to be employed.

Recommendations for Goal Achievement: In the all-out effort to get greater milk production during the war, little regard was paid to seasonality of production. This was of less importance so long as Government agencies were following a policy of buying the major share of their annual requirements of storable dairy products during the flush milk production season. In the shift back to a peacetime economy which involves immediate consumption of highly perishable products to a greater extent, efforts to get farmers to even out their production during the year will have to be resumed. Farmers should be urged to retain sufficient cows and to breed their cows and heifers to maintain fall and winter production. This will be particularly important in the fluid milk sheds where importations of suitable "outside" milk are more difficult to accomplish.

In view of the high seasonality of production and the curtailment of Government purchases, it is highly important that price ceiling controls be adjusted in time to allow and encourage private storage of butter, cheese, evaporated milk, and dry milk products. With few exceptions, storage allowances are not provided in current price ceilings and this adjustment is necessary to keep fairly steady supplies of dairy products on the consumer markets throughout the year. Also, it is necessary to protect returns to farmers by bolstering market demand and prices during the period of highest milk production.

The Department of Agriculture and the Dairy Industries Committee working together have prepared and promulgated an 8-point dairy program designed to foster efficient milk production in 1946. The program is highly appropriate and should be supported vigorously. To a much greater extent than during the war years efficient producers will enjoy an advantage over the inefficient producers. Closer attention must be given to breeding and selection of high-producing cows. Artificial insemination and the use of proved sires should be promoted. The control and elimination of disease will be necessary to assure regular production of replacement stock and milk and cream for the market. More widespread use must be made of the knowledge that exists on animal nutrition and economical feeding.

Improvements in the amount and quality of roughage can make a marked contribution toward economical milk production. Much of the dairy production will continue to come from areas not well suited for cash crop production. In many such areas feed can be purchased cheapest in the form of lime and commercial fertilizers. By first feeding the soil to feed the livestock to feed human beings, the most economical use of resources can be attained.

In all areas where dairying is practiced, greater attention to abundant roughage supplies of high quality will pay dividends. Improvements in methods of curing and handling hay should spread rapidly as more agricultural machinery becomes available. Better planned pasture systems will assure cheap feed throughout the pasture season. Also, such season can be greatly lengthened with proper planning and attention to seedings.

No other product of the farm combines the merits of such a wide variety of appetizing uses and such high nutritional value as does milk. An increasing demand for milk and its products seems assured if civilian incomes are maintained and if dairy products of high quality are made available at reasonable prices. Volume reduces greatly the per-unit cost of supplying dairy products to consumers. Continued high milk production is in the interest of producers and consumers alike. The Department may be expected to resume on a peacetime basis a great deal of the work pertaining to dairy production and marketing. These activities will include improving quality and variety of products through research, assisting producers through research and educational programs to produce economically and profitably, and improving marketing efficiencies and consumer knowledge of and demand for dairy products.

Proposed Price Support: Prices to producers for milk and butterfat will be supported at not less than 90 percent of the parity prices for these commodities. The method of providing this support will be announced at a later date.

MILK: Production on Farms -- Indicated 1946 With Comparisons

(Thousands)					% 1946 Indicated is of			
State	: 1946	:	:	:	: 1946	:	:	: 1946 Prd.
and	: Ind.	: 1937-41	: 1943	: 1944	: Prod. 1/	: 1937-41	: 1944	: Adj. Cap.
Region	:	:	:	:	: Adj. Cap.	:	:	:
Maine	638	633	618	654	690	100.8	97.6	92.5
N. H.	345	355	333	340	358	97.2	101.5	96.4
Vt.	1,473	1,384	1,452	1,493	1,550	106.4	98.3	95.0
Mass.	768	797	757	777	784	96.4	98.8	98.0
R. I.	132	134	128	129	140	98.5	102.3	94.3
Conn.	714	669	700	717	756	106.7	99.6	94.4
N. Y.	7,888	7,477	7,714	7,722	8,400	105.5	102.1	94.0
N. J.	1,039	953	1,010	1,015	1,065	109.2	102.4	97.6
Pa.	5,069	4,619	4,863	4,976	5,130	109.7	101.9	98.8
N. E.	18,066	17,021	17,575	17,828	18,873	106.1	101.3	95.7
Ill.	5,671	5,125	5,352	5,503	5,550	110.7	103.1	102.2
Ind.	3,675	3,190	3,454	3,492	3,638	115.2	105.2	99.6
Iowa	6,635	6,439	7,057	6,726	6,721	103.0	98.6	93.7
Mich.	5,454	4,773	5,333	5,375	5,534	114.3	101.5	93.6
Minn.	8,902	8,242	8,810	8,508	8,840	108.0	104.6	100.7
Mo.	4,080	3,322	3,845	4,090	4,400	122.3	99.8	92.7
Nebr.	2,759	2,559	3,064	2,735	2,941	107.8	99.1	94.0
Ohio	5,354	4,602	4,976	5,174	5,520	116.3	103.5	97.0
S. Dak.	1,654	1,651	1,804	1,710	1,642	100.2	96.7	100.7
Wis.	15,012	12,301	14,324	14,642	15,000	122.0	102.5	100.1
N. C.	59,196	52,204	58,029	58,006	59,836	113.4	102.1	99.0
Del.	167	139	160	163	170	120.1	102.5	98.2
Md.	1,009	880	955	976	1,036	114.7	103.4	97.4
Va.	1,786	1,473	1,626	1,691	1,803	121.2	105.6	99.1
W. Va.	829	793	793	824	828	104.5	100.6	100.1
N. C.	1,509	1,313	1,465	1,540	1,652	114.9	98.0	91.3
Ky.	2,228	1,912	2,093	2,121	2,321	116.5	105.0	96.0
Tenn.	2,219	1,845	2,196	2,232	2,232	120.3	99.4	99.4
E. C.	9,747	8,355	9,293	9,547	10,042	116.7	102.1	97.1
Ala.	1,326	1,186	1,309	1,360	1,389.4	111.8	97.5	95.4
Ark.	1,494	1,365	1,411	1,445	1,500	109.5	103.4	99.6
Fla.	460	327	420	437	500	140.71/	105.3	92.0
Ga.	1,167	1,082	1,149	1,146	1,163	107.9	101.8	99.9
La.	710	636	686	696	709	111.6	102.0	100.1
Miss.	1,431	1,283	1,342	1,410	1,440	111.5	101.5	99.4
Okla.	2,703	2,454	2,692	2,696	2,725	110.1	100.3	99.2
S. C.	603	551	589	604	628	109.4	99.8	96.0
Tex.	4,467	4,265	4,389	4,406	4,550	104.7	101.4	98.2
South	14,361	13,149	13,987	14,200	14,609.4	109.2	101.1	98.3
Ariz.	251	228	252	249	250	110.1	100.8	100.4
Calif.	5,598	4,671	5,223	5,479	5,716	119.8	102.2	98.0
Colo.	1,011	997	1,099	1,056	1,081	101.4	95.7	93.5
Idaho	1,372	1,180	1,369	1,405	1,415	116.3	97.7	97.0
Kans.	3,191	2,898	3,296	3,172	3,297	110.1	100.6	96.8
Mont.	694	673	760	721	688.3	103.1	96.3	100.8
Nev.	103	103	113	108	108.	100.0	100.0	100.0
N. Mex.	274	271	300	270	260	101.1	101.5	105.4
N. Dak.	2,094	1,985	2,264	2,183	2,100	105.5	96.0	99.7
Oreg.	1,404	1,374	1,452	1,463	1,445	102.2	96.0	97.2
Utah	696	542	655	709	770	128.4	98.2	90.4
Wash.	2,146	1,966	2,167	2,242	2,205	109.2	95.7	97.3
Wyo.	308	281	306	314	322	109.6	98.1	95.7
West	19,147	17,174	19,256	19,371	19,657.3	111.5	98.8	97.4
U. S.	120,517	107,903	113,140	118,952	123,017.7	111.7	101.3	98.0

1/ Data not comparable

MILK COWS: Number on Farms — Indicated 1946 With Comparisons
(Average Number During Year)

State and Region	(Thousands)				% 1946 indicated is of			
	: 1946 : 1937- : 1943 : 1944 :				: 1946 : 1937- : 1944 :			
	: ind. : 41 : 1943 : 1944 :				: Adj. : 41 : 1944 : Adj. :			
	: : : : :				: Cap.1/ : : : :			
Maine	: 125:	133:	124:	127:	133:	94.0 :	93.4 :	94.0
N. H.	: 67:	73:	66:	67:	69:	91.8 :	100.0 :	97.1
Vt.	: 278:	276:	273:	281:	292:	100.7 :	98.9 :	95.2
Mass.	: 129:	134:	130:	132:	133:	96.3 :	97.7 :	97.0
R. I.	: 21:	21:	21:	21:	22:	100.0 :	100.0 :	95.5
Conn.	: 121:	115:	120:	123:	124:	105.2 :	93.4 :	97.6
N. Y.	: 1,337:	1,312:	1,330:	1,350:	1,400:	101.0 :	99.0 :	95.5
N. J.	: 155:	145:	154:	155:	157:	106.9 :	100.0 :	98.7
Pa.	: 930:	857:	909:	930:	950:	108.5 :	100.0 :	97.9
N. E.	: 3,163:	3,036:	3,127:	3,186:	3,280:	103.2 :	99.3 :	96.4
Ill.	: 1,112:	1,064:	1,115:	1,123:	1,135:	104.5 :	99.0 :	98.0
Ind.	: 799:	735:	785:	789:	815:	108.7 :	100.0 :	98.0
Iowa	: 1,368:	1,382:	1,461:	1,425:	1,415:	99.0 :	93.0 :	96.7
Mich.	: 1,010:	896:	995:	1,020:	1,050:	112.7 :	99.0 :	96.2
Minn.	: 1,712:	1,620:	1,748:	1,747:	1,700:	105.7 :	98.0 :	100.7
Mo.	: 1,033:	906:	1,020:	1,065:	1,100:	114.0 :	97.0 :	95.9
Nebr.	: 620:	606:	675:	660:	653:	102.3 :	93.9 :	94.9
Ohio	: 1,104:	994:	1,077:	1,115:	1,150:	111.1 :	99.0 :	96.0
S. Dak.	: 447:	450:	485:	475:	462:	99.3 :	94.1 :	96.8
Wis.	: 2,461:	2,130:	2,389:	2,461:	2,536:	115.5 :	100.0 :	97.0
N. C.	: 11,666:	10,783:	11,750:	11,390:	12,016:	108.2 :	98.1 :	97.1
Del.	: 37:	32:	36:	37:	38:	112.5 :	100.0 :	94.7
Md.	: 208:	189:	205:	210:	216:	110.1 :	99.0 :	96.3
Va.	: 441:	396:	436:	445:	439:	111.4 :	99.1 :	100.5
W. Va.	: 227:	225:	232:	232:	230:	100.9 :	97.8 :	98.7
N. C.	: 382:	336:	371:	390:	413:	113.7 :	97.9 :	92.5
Ky.	: 594:	529:	593:	606:	619:	112.3 :	98.0 :	96.0
Tenn.	: 608:	532:	615:	627:	615:	114.3 :	97.0 :	98.9
E. C.	: 2,496:	2,239:	2,488:	2,547:	2,570:	111.5 :	92.0 :	97.1
Ala.	: 408:	365:	409:	416:	424:	111.8 :	98.1 :	96.2
Ark.	: 485:	435:	490:	485:	495:	111.5 :	100.0 :	98.0
Fla.	: 115:	101:	112:	115:	121:	113.9 :	100.0 :	95.0
Ca.	: 359:	334:	359:	366:	363:	107.5 :	98.1 :	99.0
La.	: 296:	278:	293:	296:	299:	106.5 :	100.0 :	99.0
Miss.	: 530:	487:	520:	530:	535:	108.8 :	100.0 :	99.1
Okla.	: 824:	698:	836:	832:	840:	118.1 :	99.0 :	98.1
S. C.	: 168:	155:	166:	170:	177:	108.4 :	98.8 :	94.9
Tex.	: 1,396:	1,323:	1,425:	1,454:	1,454:	105.5 :	96.0 :	96.0
South	: 4,581:	4,176:	4,610:	4,664:	4,708:	109.7 :	98.2 :	97.3
Ariz.	: 47:	43:	48:	47:	47:	109.3 :	100.0 :	100.0
Calif.	: 783:	687:	757:	775:	805:	114.0 :	101.0 :	97.3
Colo.	: 215:	219:	229:	229:	225:	98.2 :	93.9 :	95.6
Idaho	: 245:	204:	248:	250:	245:	120.1 :	98.0 :	100.0
Kans.	: 769:	709:	804:	793:	785:	108.5 :	97.0 :	98.0
Mont.	: 146:	146:	150:	155:	144:	100.0 :	94.2 :	101.4
Nev.	: 19:	19:	20:	19:	19:	100.0 :	100.0 :	100.0
N. Mex.	: 73:	70:	74:	73:	70:	104.3 :	100.0 :	104.3
N. Dak.	: 517:	481:	543:	539:	525:	107.5 :	95.9 :	98.5
Oreg.	: 253:	249:	264:	264:	260:	101.6 :	95.8 :	97.3
Utah	: 118:	96:	112:	119:	127:	122.9 :	99.2 :	92.9
Wash.	: 349:	323:	363:	364:	358:	108.0 :	95.9 :	97.5
Wyo.	: 67:	65:	67:	68:	70:	103.1 :	98.5 :	95.7
West	: 3,601:	3,311:	3,638:	3,695:	3,630:	108.8 :	97.5 :	97.9
U. S.	: 25,507:	23,575:	28,663:	25,982:	26,254:	108.2 :	98.2 :	97.2

1/ Assuming continued wartime conditions.

MILK: Production per Cow Required to Meet 1946 Milk Production Goal
With Comparisons

State and Region	(Thousands)				% 1946 Would Be of			
	1946	1937-41	1943	1944	1946 Prod. 1/ Adj. Cap.	1937-41	1944	1946 Prod. Adj. Cap.
Maine	5,100	4,759	4,980	5,150	5,188	107.2	99.0	98.3
N. H.	5,150	4,863	5,050	5,080	5,188	105.9	101.4	99.3
Vt.	5,300	5,014	5,320	5,330	5,308	105.7	99.4	99.8
Mass.	5,950	5,948	5,820	5,390	5,895	100.0	101.0	100.1
R.I.	6,300	6,381	6,100	6,150	6,364	98.7	102.4	99.0
Conn.	5,900	5,817	5,830	5,830	6,097	101.4	101.2	96.8
N. Y.	5,900	5,699	5,800	5,720	6,000	103.5	103.1	98.3
N. J.	6,700	6,576	6,560	6,550	6,783	101.9	102.3	98.8
Pa.	5,450	5,390	5,350	5,350	5,400	101.1	101.9	100.9
N. E.	5,712	5,552	5,621	5,596	5,754	102.9	102.1	99.3
Ill.	5,100	4,817	4,800	4,900	4,890	105.9	104.1	104.3
Ind.	4,600	4,340	4,400	4,370	4,525	106.0	105.3	101.7
Iowa	4,850	4,659	4,830	4,720	4,750	104.1	102.8	102.1
Mich.	5,400	5,327	5,360	5,270	5,270	101.4	102.5	102.5
Minn.	5,200	5,088	5,040	4,870	5,200	102.2	106.8	100.0
Mo.	3,950	3,667	3,770	3,840	4,000	107.7	102.9	98.8
Nebr.	4,450	4,223	4,540	4,220	4,504	105.4	105.5	98.8
Ohio	4,850	4,630	4,620	4,640	4,800	104.8	104.5	101.0
S. Dak.	3,700	3,669	3,720	3,600	3,554	100.8	102.8	104.1
Wis.	6,100	5,775	6,000	5,950	5,915	105.6	102.5	103.1
N. C.	5,074	4,841	4,943	4,879	4,980	104.8	104.0	101.9
Del.	4,500	4,344	4,450	4,400	4,474	103.6	102.3	100.6
Md.	4,850	4,656	4,660	4,650	4,796	104.2	104.3	101.1
Va.	4,050	3,720	3,730	3,800	4,107	108.9	106.6	98.6
W. Va.	3,650	3,524	3,440	3,550	3,600	103.6	102.8	101.4
N. C.	3,950	3,908	3,950	3,950	4,000	101.1	100.0	98.8
Ky.	3,750	3,614	3,530	3,500	3,750	103.8	107.1	100.0
Tenn.	3,650	3,468	3,570	3,560	3,625	105.2	102.5	100.6
E. C.	3,903	3,732	3,735	3,748	3,907	104.6	104.1	99.9
Ala.	3,250	3,249	3,200	3,270	3,277	100.0	99.4	99.2
Ark.	3,080	3,138	2,380	2,980	3,030	98.2	103.4	101.7
Fla.	4,000	3,238	3,750	3,800	4,132	123.5	105.3	96.8
Ga.	3,250	3,240	3,200	3,130	3,218	100.3	103.8	101.0
La.	2,400	2,288	2,340	2,350	2,371	104.9	102.1	101.2
Miss.	2,700	2,634	2,580	2,660	2,692	102.5	101.5	100.3
Okla.	3,280	3,516	3,220	3,240	3,244	93.3	101.2	101.1
S. C.	3,590	3,555	3,550	3,550	3,548	101.0	101.1	101.2
Tex.	3,200	3,224	3,080	3,030	3,129	99.3	105.6	102.3
South	3,135	3,149	3,024	3,045	3,103	99.6	103.0	101.0
Ariz.	5,350	5,302	5,250	5,300	5,319	100.9	100.9	100.6
Calif.	7,150	6,799	6,900	7,070	7,101	105.2	101.1	100.7
Colo.	4,700	4,553	4,800	4,610	4,804	103.2	102.0	97.8
Idaho	5,600	5,784	5,520	5,620	5,776	96.8	99.6	97.0
Kans.	4,150	4,087	4,100	4,000	4,200	101.5	103.8	98.8
Mont.	4,750	4,610	4,780	4,650	4,780	103.0	102.2	99.4
Nev.	5,700	5,684	5,650	5,710	5,684	100.3	99.8	100.3
N. Mex.	3,750	3,871	4,060	3,700	3,714	96.9	101.4	101.0
N. Dak.	4,050	4,127	4,170	4,050	4,000	98.1	100.0	101.3
Oreg.	5,550	5,518	5,500	5,540	5,558	100.6	100.2	99.9
Utah	5,900	5,646	5,850	5,960	6,063	104.5	99.0	97.3
Wash.	6,150	6,007	5,970	6,160	6,159	101.0	99.3	99.9
Wyo.	4,600	4,323	4,570	4,620	4,600	106.4	99.6	100.0
West	5,317	5,187	5,220	5,242	5,342	102.5	101.4	99.5
U. S.	4,725	4,577	4,604	4,578	4,686	103.2	103.2	100.8

1/ Data not comparable



Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

EGGS AND POULTRY

Eggs: With the return of peace and the end of most wartime needs the 1946 requirements for eggs are sharply reduced from the levels of the past few years. The 1946 farm egg production goal is being set at 3,910 million dozen eggs. This quantity, to which will be added about 10 percent representing non-farm production, will provide sufficient eggs to meet all the presently known requirements for the coming year. The goal of 3,910 million dozen eggs represents a decline of 15 percent from the indicated production of 1945 and 20 percent above the average production during the period 1937-41.

Due to the return of more normal food supplies in the U. S., civilian egg consumption in 1946 is expected to fall considerably below the unprecedented rate of 1945. The following table shows for the past several years the total volume of egg production, the proportion consumed by civilians and other outlets, and the civilian per-capita consumption.

Year	:Total Egg :Production :(mil.doz.)	:Percent con- :sumed by U.S. :civilians	: Percent go- : ing to all : other uses	: Civilian : Per Capita : Consumption
1935-39	3,335	97	3	298
1940	3,629	97	3	316
1941	3,828	90	10	311
1942	4,430	77	23	311
1943	4,972	75	25	345
1944	5,305	71	29	351
1945 Indicated	5,060	84	16	390-5
1946 Requirements	4,300	92	8	342

Requirements for eggs in 1946 can be met in full by the production of 4,300 million dozen eggs, which is the farm production goal of 3,910 million dozens, plus 10 percent for non-farm production. This covers the following estimated requirements: Civilians, 3947.3 million dozen; military and war services, 156.3 million dozen fresh and frozen eggs; exports and shipments, 14.0 million dozen fresh and frozen eggs; 170 million dozen eggs for hatching; and 12.4 million dozen for drying to meet the estimated export demand of 4.2 million pounds of dried eggs. There are no military requirements for dried eggs from 1946 production since present military stocks are adequate.

The civilian requirement is based on a consumption of 342 eggs per capita (compared with a consumption of 351 eggs in 1944 and an estimate of 390 eggs in 1945), and on the assumption that the national income will be approximately 135 billion dollars in 1946. The assumption is also made that the supply of meats other than poultry will be sufficiently large so that there will be no need for the substitution of eggs for meat.

In addition to the stated requirements, certain other tentative requirements may develop which would total about 100 million dozen shell egg equivalent. These requirements, should they develop, could be filled from stocks of dried and frozen eggs now in Government hands.

No requirements have been received from UNRRA, although it is believed that UNRRA can be an outlet for dried eggs at less than support prices in the event of a Government buying program.

Hens and Pullets on Farms: The suggested goal of 408,063,000 hens and pullets on farms January 1, 1946 is 13 percent below the number on farms January 1, 1945; 14 percent below the indicated number that will be on farms January 1, 1946, but 8 percent above the January 1, 1937-41 average. This number of layers and potential layers on farms at the beginning of 1946 would, with an expected rate of lay of 115 eggs per hen on farms January 1, provide enough eggs to meet all presently known and anticipated requirements for eggs at prices which will return to farmers not less than 90 percent of parity for the year without Government intervention in the marketing system.

The national reduction desired in hen numbers is 13 percent below the number on farms January 1, 1945. This was distributed among the States by requesting the heaviest reduction, 16 percent, in the Middle West from the Dakotas and Minnesota to Texas, where the largest increase in egg production occurred during the war due to the concentration of drying plants in this area and with the reduction decreasing toward both coasts. Certain inequities were apparent where this method reduced some States below their prewar 1937-41 level. In 13 States the State goals were set at the 1937-41 average. Arizona was the exception to this adjustment where the expected number of hens and pullets January 1, 1946 is below the 1937-41 average.

It is expected that on January 1, 1946 there will be a total of 475.4 million layers and potential layers on farms. Thus, there will be a surplus of 67.4 million layers, which if kept could produce 20 million cases more eggs than will be required. The most important job facing the poultry industry during the early months of 1946 is to dispose of these excess layers. In order to recommend the extent of culling that must be done state by state so that hen numbers can be reduced to the proper level, a goal of 349 million hens on farms on March 1 has been developed. Between January 1 and March 1, farmers should reduce their total layers and potential layers from 475.4 million to 349 million. This reduction should be made insofar as possible in the old hens in the flocks, thereby increasing the proportion of pullets making up the flock. Pullets are more efficient egg producers than hens in their second year of lay and are therefore much more profitable. The table showing the March 1 goals, by states, also shows the normal reduction which usually occurs due to mortality, farm consumption and farm sales, together with the additional numbers that should be culled in order to bring State totals down to the March 1 goal. To the extent that these additional hens are not culled from flocks, egg production will be at a rate above the goal rate and prices can be expected to drop below 90 percent of parity unless supported by Government action.

Young Chickens: A very important goal being announced in connection with eggs and poultry is the goal for the number of young chickens to be raised in 1946 for flock replacement purposes. The goal suggested for chickens raised on farms is 680 million, 17 percent below the number raised in 1945 and 9 percent below the number raised in 1944. There can be an adequate number of pullets raised from these young chickens to maintain flock sizes at the end of 1946 at the same level as is being recommended for January 1, 1946, and to permit an increase in the percentage of pullets making up the flocks. Sometime during August or September 1946, a goal will be announced for hen numbers on January 1, 1947, since it is too early at this time to make adequate estimates of our requirements for eggs during that year. It would even be possible to expand the size of laying flocks by the end of 1946 from the recommended young chicken goal should conditions warrant a greater egg production in 1947 than in 1946.

Turkeys: A goal for turkeys raised of 39,700,000 birds is being recommended for 1946, which will meet all presently known requirements. This goal represents a reduction of 10 percent from the all-time record output in 1945, which is estimated at 44,150,000 head. It is assumed that the requirements for civilians next year will be approximately the same as in 1945, about 4.2 pounds per capita. Tentative military requirements amount to 22 million pounds, and it is believed that exports and imports of 2 million pounds each will be in balance. It is also believed that storage stocks of frozen turkeys may decline during the year by as much as 20 million pounds, thus leaving total requirements at about 600 million pounds. While this turkey goal represents a decline of 10 percent, it should be remembered that military requirements will be approximately 100 million pounds less than they were in 1944 and that ample meat supplies are expected to be available in the fall of 1946.

Broilers: No goal for broiler production is being established for 1946 because of the difficulty of estimating the quantity of meat that will come from farm sales of hens and young chickens during the year. However, as a guide to producers, it is expected that chicken meat coming from farms will be of such a quantity that only about 70 percent as many broilers can find a ready demand at favorable prices as were produced in 1945. This reduction of 30 percent from the 1945 production is considered necessary to avoid oversupply and consequent low prices which would result in heavy losses to producers.

A small variation in production of chicken meat on farms, which has represented about 78 percent of all sales of chicken meat, can cause a wide fluctuation in demand for commercial broilers at a given price. Hence, the market may vary considerably in 1946. During 1945 it is estimated that about 310 million broilers have been raised, which is an all-time record and compares with 231 million raised in 1944. Commercial broilers supplement the supply of poultry meat sold from general farms, and during 1944, civilians consumed an average of 23.6 pounds per capita. It is estimated that in 1945 there will be available 24.5 pounds per capita of chickens for civilian consumption. This increase of .9 pounds per capita above 1944 may seem small in view of the 24 percent increase in hatchings this year over last. This is explained by the fact that during 1944 farmers reduced their laying flocks by about 50 million head, thus contributing a great supply of poultry meat for civilian consumption.

Civilian demand for chicken meat in 1946 is expected to be about 22.0 pounds per capita. This expected decrease from 1945 is due to an expected decline in the national income and to more plentiful supplies of red meats during most of the year. Military demand for chickens is expected to be only about 25 percent that of 1945. The proportion of these expected requirements, which will not be supplied from farm chicken meat production, is less than in the past few years. This would indicate that a sizeable reduction should be made in commercial broiler production. Also, present indications are that feed prices cannot be expected to decline much, if any, before the fall of 1946, so that profits will probably be smaller.

Broiler producers are beginning the new year with record numbers of broilers on farms. Reports being received from the principal broiler areas indicate that far more chicks are being started during the fall of 1945 than ever before. This means large marketings early in 1946. It is reasonable to assume that farmers will cull their hens more closely than normal in the early spring of 1946 because egg prices are expected to be at or near support levels while the prices of feeds may well remain at nearly the present level. It is also expected that storage stocks of dressed poultry available for civilians will be a record high, and that the supply of red meats will be much larger than a year earlier and will

be almost in balance with demand. Therefore, broiler producers should be cautious in their production plans for 1946. They should thoroughly review the poultry meat supply situation and the probable demand for broilers before they start a brood of chicks. It should be remembered that the Department of Agriculture is not required under the terms of the Steagall Amendment to support the price of young chickens weighing less than 3-1/2 pounds live weight, which includes practically all of the birds raised by commercial broiler producers.

Proposed Price Support: During 1946, egg prices will be supported at levels which will reflect a U. S. average farm price of 90 percent of parity. Based upon the present level of parity this will mean a U. S. average farm price for all grades and sizes of eggs produced of about 29 cents per dozen for the spring production period. A purchase plan will be used in which U. S. grades of shell eggs, frozen eggs, and dried eggs will be purchased in carlot quantities. In territories where loss-off buying is not available to producers, field facilities of the USDA and State agencies will cooperate with marketing agencies in an effort to provide facilities so that producers in such areas may have the benefit of egg price support.

The price for chickens will be supported by buying dressed chickens at levels which will reflect a U. S. average farm price of 90 percent of parity. During 1946, this will mean a U. S. average farm price for all classes and weights of chickens subject to price support of about 18 cents per pound live weight. Chickens weighing less than 3-1/2 pounds live weight and old roosters will not be purchased.

The price for turkeys will be supported by buying dressed turkeys at levels which will reflect U. S. average farm prices of 90 percent of parity. During 1946, this will mean a U. S. average farm price of slightly under 23 cents per pound live weight for all classes and weights.

FARM EGG PRODUCTION; SUGGESTED 1946 GOAL

State and Region:	1945		1946	1946 Goal as % of	
	1937-41	Indicated	Goal	1937-41	1945
	: 1,000 Dozens	: 1,000 Dozens	: 1,000 Dozens	: Percent	: Percent
Maine	: 21,583	33,583	29,332	136	87
New Hampshire	: 19,167	29,667	25,969	135	88
Vermont	: 9,500	14,333	12,550	132	88
Massachusetts	: 43,667	80,583	69,850	160	87
Rhode Island	: 4,833	6,333	5,556	115	88
Connecticut	: 28,667	41,250	36,792	128	89
New York	: 142,583	157,250	152,944	107	97
New Jersey	: 62,083	74,833	71,961	116	96
Pennsylvania	: 173,334	202,667	199,105	115	98
N.E.	: 505,417	640,499	604,059	120	94
Ohio	: 182,833	231,500	204,365	112	88
Indiana	: 124,250	167,000	142,442	115	85
Illinois	: 163,750	228,500	190,667	116	83
Michigan	: 106,500	133,750	114,660	108	86
Wisconsin	: 139,667	190,500	156,904	112	82
Minnesota	: 158,250	314,000	252,975	160	81
Iowa	: 220,167	356,750	279,302	127	78
Missouri	: 164,000	240,833	190,333	116	79
South Dakota	: 46,083	88,667	72,993	158	82
Nebraska	: 91,250	168,500	130,529	143	77
N.C.	: 1,396,750	2,120,000	1,735,175	124	82
Delaware	: 9,250	10,000	9,541	103	95
Maryland	: 30,417	36,167	31,683	104	88
Virginia	: 70,833	86,167	76,161	108	88
West Virginia	: 34,584	36,333	37,709	109	102
North Carolina	: 55,583	93,583	80,935	146	86
Kentucky	: 70,750	98,750	85,274	121	86
Tennessee	: 63,250	90,833	79,795	126	88
E. C.	: 334,667	452,333	401,093	120	89
South Carolina	: 20,833	32,667	27,263	131	83
Georgia	: 42,167	54,167	48,133	114	89
Florida	: 16,667	16,250	17,101	103	105
Alabama	: 42,667	58,250	47,357	111	89
Mississippi	: 39,833	51,667	44,125	111	85
Arkansas	: 48,233	61,833	52,092	108	84
Louisiana	: 24,333	31,833	27,235	112	86
Oklahoma	: 81,500	130,083	103,514	127	80
Texas	: 186,583	278,000	220,818	118	79
SOUTH	: 502,916	709,750	587,646	117	83
North Dakota	: 27,917	55,667	45,158	162	81
Kansas	: 121,917	178,750	145,079	119	81
Montana	: 15,333	20,500	17,607	115	86
Idaho	: 19,500	22,250	19,852	102	89
Wyoming	: 6,167	7,250	7,012	114	97
Colorado	: 26,250	36,250	30,423	116	84
New Mexico	: 8,250	10,417	8,908	108	86
Arizona	: 5,500	4,917	5,150	94	105
Utah	: 23,750	30,750	26,160	110	85
Nevada	: 2,500	3,417	2,729	109	80
Washington	: 69,583	73,917	71,342	103	97
Oregon	: 36,083	39,417	37,640	104	95
California	: 149,417	170,500	164,962	110	97
WEST	: 512,167	654,002	582,022	114	89
UNITED STATES	: 3,251,917	4,576,584	3,910,000	120	85

HENS AND PULLETS ON FARMS JANUARY 1; SUGGESTED 1946 GOAL

State and Region:	1937-41	1945	1946 Indicated	1946 Suggested Goal	1946 Suggested Goal as % of 1937-41	1945	1946 Indicated
	Thousands	Thousands	Thousands	Thousands	Percent	Percent	Percent
Maine	1,777	2,505	2,756	2,179	123	87	79
New Hampshire	1,611	2,288	2,471	1,991	124	87	81
Vermont	787	1,143	1,143	994	126	87	87
Massachusetts	3,515	5,964	6,262	5,189	148	87	83
Rhode Island	385	516	547	449	117	87	82
Connecticut	2,378	3,464	3,603	3,014	127	87	84
*New York	13,160	14,229	13,802	13,160	100	92	95
New Jersey	5,332	7,701	7,624	6,777	127	88	89
Pennsylvania	17,653	20,977	20,557	18,460	105	88	90
N.E.	46,598	58,787	58,765	52,213	112	89	89
*Ohio	19,554	21,522	22,382	19,554	100	91	87
Indiana	13,679	15,613	16,084	13,739	100	88	85
Illinois	20,264	23,676	24,150	20,361	100	86	84
*Michigan	11,524	12,607	12,859	11,524	100	91	90
Wisconsin	14,292	17,453	17,453	14,661	103	84	84
Minnesota	18,145	28,364	30,633	23,824	131	84	78
Iowa	28,665	36,484	36,484	30,647	107	84	84
Missouri	19,772	24,416	24,660	20,509	104	84	83
South Dakota	6,207	9,805	10,099	8,236	133	84	82
Nebraska	11,406	16,594	16,262	13,939	122	84	86
N.C.	163,503	206,534	211,065	176,994	108	86	84
*Delaware	943	974	1,003	943	100	97	94
*Maryland	3,324	3,636	3,563	3,324	100	91	93
*Virginia	8,281	9,049	9,049	8,281	100	92	92
**West Virginia	3,903	3,967	3,888	3,888	100	98	100
North Carolina	8,108	12,644	12,518	11,000	136	87	88
Kentucky	9,716	11,382	11,723	9,902	102	87	84
Tennessee	9,438	11,547	11,662	10,046	106	87	86
E.C.	43,713	53,199	53,406	47,384	108	89	89
South Carolina	3,340	4,628	4,535	4,026	121	87	89
Georgia	6,610	8,077	7,915	7,108	108	88	90
*Florida	2,087	2,064	2,208	2,037	100	101	95
Alabama	6,422	7,570	7,494	6,586	103	87	88
Mississippi	6,608	7,982	7,503	6,944	105	87	93
Arkansas	7,340	8,624	8,365	7,417	101	86	89
Louisiana	4,047	4,926	4,729	4,286	106	87	91
Oklahoma	10,178	13,399	13,131	11,255	111	84	86
Texas	23,616	31,130	32,375	26,149	111	84	81
SOUTH	70,248	88,400	88,255	75,858	108	86	86
North Dakota	3,658	6,303	6,492	5,295	145	84	82
Kansas	13,586	17,506	17,681	14,705	108	84	83
Montana	1,775	2,246	2,201	1,932	109	86	88
Idaho	2,141	2,431	2,407	2,139	100	88	89
*Wyoming	723	797	797	723	100	91	91
Colorado	3,020	3,744	4,044	3,220	107	86	80
New Mexico	997	1,169	1,169	1,005	101	86	86
**Arizona	571	531	531	531	93	100	100
Utah	2,207	2,522	2,648	2,219	101	88	84
Nevada	240	283	288	253	105	88	88
*Washington	6,009	6,308	6,308	6,009	100	95	95
*Oregon	3,286	3,466	3,362	3,286	100	95	98
*California	14,297	14,930	15,975	14,297	100	96	89
WEST	52,510	62,241	63,903	55,614	106	89	87
UNITED STATES	376,577	469,161	475,395	408,063	108	87	86

* Less reduction asked in order not to reduce these states below their 1937-41 average.

** No reduction from 1946 indicated asked because 1946 indicated is below 1937-41 average.

HENS AND PULLETS, MARCH 1, SUGGESTED GOAL

State and Region:	January 1:	March 1:	January 1:	Normal:	Total	
	Goal	Goal	Indicated	Disappearance:	Additional:	Reduction
	1946	1946	1946	1/1/46-3/1/46	Calling	1/1/46-3/1/46
	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
Maine	: 2,179	1,896	2,756	358	502	860
New Hampshire	: 1,991	1,732	2,471	321	418	739
Vermont	: 994	865	1,143	149	129	278
Massachusetts	: 5,189	4,514	6,262	814	934	1,748
Rhode Island	: 449	391	547	71	85	156
Connecticut	: 3,014	2,622	3,603	468	513	981
New York	: 13,160	11,449	13,802	1,794	559	2,353
New Jersey	: 6,777	5,896	7,624	991	737	1,728
Pennsylvania	: 18,460	16,060	20,557	2,673	1,824	4,497
N.E.	: 52,213	45,425	58,785	7,639	5,701	13,340
Ohio	: 19,554	17,012	22,382	2,910	2,460	5,370
Indiana	: 13,739	11,953	16,084	2,091	2,040	4,131
Illinois	: 20,331	17,714	24,150	3,140	3,296	6,436
Michigan	: 11,524	10,026	12,859	1,672	1,161	2,833
Wisconsin	: 14,661	12,755	17,453	2,269	2,429	4,698
Minnesota	: 23,824	20,727	30,633	3,982	5,924	9,906
Iowa	: 30,647	26,663	36,484	4,742	5,079	9,821
Missouri	: 20,509	17,843	24,660	3,206	3,611	6,817
South Dakota	: 8,236	7,165	10,099	1,313	1,621	2,934
Nebraska	: 13,939	12,127	16,262	2,114	2,021	4,135
N.C.	: 176,994	153,985	211,066	27,439	29,642	57,081
Delaware	: 945	783	1,003	171	49	220
Maryland	: 3,324	2,759	3,563	606	198	804
Virginia	: 8,281	6,873	9,049	1,538	638	2,176
West Virginia	: 3,838	3,227	3,888	661	0	661
North Carolina	: 11,000	9,130	12,518	2,128	1,260	3,388
Kentucky	: 9,902	8,219	11,723	1,992	1,512	3,504
Tennessee	: 10,046	8,338	11,662	1,983	1,341	3,324
E.C.	: 47,334	39,329	53,406	9,079	4,998	14,077
South Carolina	: 4,026	3,301	4,535	816	418	1,234
Georgia	: 7,108	5,829	7,915	1,425	661	2,086
Florida	: 2,087	1,711	2,208	397	100	497
Alabama	: 6,586	5,401	7,494	1,349	744	2,093
Mississippi	: 6,944	5,694	7,503	1,351	458	1,809
Arkansas	: 7,417	6,082	8,365	1,506	777	2,283
Louisiana	: 4,236	3,515	4,729	851	363	1,214
Oklahoma	: 11,255	9,229	13,131	2,364	1,538	3,902
Texas	: 26,149	21,442	32,375	5,827	5,106	10,933
SOUTH	: 75,858	62,204	83,255	15,886	10,165	26,051
North Dakota	: 5,295	4,607	6,492	844	1,041	1,885
Kansas	: 14,705	12,793	17,681	2,298	2,590	4,888
Montana	: 1,932	1,681	2,201	286	234	520
Idaho	: 2,139	1,861	2,407	313	233	546
Wyoming	: 723	629	797	104	64	168
Colorado	: 3,220	2,801	4,044	326	717	1,243
New Mexico	: 1,005	874	1,169	152	143	295
Arizona	: 531	462	531	69	0	69
Utah	: 2,219	1,931	2,648	344	373	717
Nevada	: 253	220	288	37	31	68
Washington	: 6,009	5,228	6,308	820	260	1,080
Oregon	: 3,236	2,859	3,362	437	66	503
California	: 14,297	12,438	15,975	2,077	1,460	3,537
WEST	: 55,614	48,384	63,963	8,307	7,212	15,519
UNITED STATES	: 408,063	349,327	475,395	68,350	57,718	126,068

CHICKENS RAISED - SUGGESTED 1946 GOAL.

State and Region:	1937-41	1944	1945	1946	1946 Goal as % of		
	: Thousands	: Thousands	: Thousands	: Thousands	: 1937-41:	: 1944	: 1945
					Percent	Percent	Percent
Maine	: 3,759	4,400	5,324	4,073	108	93	77
New Hampshire	: 3,402	3,715	4,235	3,609	106	97	85
Vermont	: 1,314	1,692	1,912	1,548	118	91	81
Massachusetts	: 7,412	10,483	11,112	9,406	127	90	85
Rhode Island	: 814	894	948	793	97	89	84
Connecticut	: 4,609	4,747	4,984	4,524	98	95	91
New York	: 19,377	21,154	23,269	19,755	102	93	85
New Jersey	: 9,799	9,898	10,888	10,173	104	103	93
Pennsylvania	: 28,507	35,218	40,853	30,849	108	88	76
N.E.	: 78,993	92,201	103,525	84,752	107	92	82
Ohio	: 30,704	29,988	33,587	29,354	96	98	87
Indiana	: 27,444	30,418	33,460	27,759	101	91	83
Illinois	: 35,103	38,944	42,838	34,794	99	89	81
Michigan	: 18,561	18,133	22,666	17,300	93	95	76
Wisconsin	: 19,355	22,656	27,414	19,794	102	87	72
Minnesota	: 31,891	43,783	48,161	38,239	120	87	79
Iowa	: 48,834	59,618	62,599	50,926	104	85	81
Missouri	: 32,523	33,445	38,462	29,820	92	89	78
South Dakota	: 11,701	18,044	20,209	14,930	128	83	74
Nebraska	: 24,889	32,391	34,658	28,953	116	89	84
N.C.	: 281,005	327,420	364,054	291,869	104	89	80
Delaware	: 2,135	2,467	2,788	2,341	110	95	84
Maryland	: 7,036	7,572	8,329	7,124	101	94	86
Virginia	: 16,162	18,638	18,265	16,731	104	90	92
West Virginia	: 5,413	5,159	5,520	5,249	97	102	95
North Carolina	: 18,305	23,466	22,293	22,225	121	95	100
Kentucky	: 20,222	23,027	23,257	20,006	99	87	86
Tennessee	: 15,836	16,486	16,321	15,081	95	91	92
E.C.A.	: 85,109	96,815	96,773	88,757	104	92	92
South Carolina	: 8,540	9,812	10,793	9,389	113	96	87
Georgia	: 13,957	16,355	15,374	14,764	106	90	96
Florida	: 4,360	3,780	4,536	4,217	97	112	93
Alabama	: 12,137	13,310	14,375	11,939	98	90	83
Mississippi	: 13,239	15,251	16,319	13,702	103	90	84
Arkansas	: 13,547	13,061	13,845	12,675	94	97	92
Louisiana	: 8,441	8,593	9,452	8,215	97	96	87
Oklahoma	: 17,350	18,265	20,822	16,565	94	90	79
Texas	: 35,268	40,605	44,666	36,539	104	90	82
SOUTH	: 126,639	139,032	150,182	127,805	101	92	85
North Dakota	: 7,097	12,309	12,432	10,149	143	82	82
Kansas	: 24,745	28,199	30,173	25,129	102	89	83
Montana	: 3,470	4,572	4,801	3,812	110	83	79
Idaho	: 3,607	4,269	4,397	3,878	108	91	88
Wyoming	: 1,384	1,708	2,050	1,502	109	88	73
Colorado	: 5,580	5,576	7,249	5,260	94	94	73
New Mexico	: 1,396	1,373	1,510	1,205	86	88	80
Arizona	: 934	723	788	757	81	105	96
Utah	: 2,670	2,620	3,144	2,409	90	92	77
Nevada	: 395	436	480	394	100	90	82
Washington	: 7,777	8,387	9,980	8,113	104	97	81
Oregon	: 4,634	4,182	4,642	4,251	92	102	92
California	: 21,029	19,821	25,173	19,978	95	101	79
WEST	: 84,718	94,175	106,819	86,837	103	92	81
UNITED STATES	: 656,464	749,643	821,353	680,000	104	91	83

TURKEYS RAISED ON FARMS: SUGGESTED STATE GOALS FOR 1946

State and Region	: 1937-41:	: 1944	: 1945 : Indicated:	: 1946 goal	: 1946 Goal as % of 1937-41:	: 1944	: 1945
	: 1,000	1,000	1,000	1,000	Percent	Percent	Percent
Maine	: 46	43	52	49	107	114	94
New Hampshire	: 54	71	92	76	141	107	83
Vermont	: 127	159	207	172	135	108	83
Massachusetts	: 216	227	272	242	112	107	89
Rhode Island	: 22	30	35	32	145	107	91
Connecticut	: 95	146	185	156	164	107	84
New York	: 372	428	586	486	131	114	83
New Jersey	: 127	192	259	215	169	112	83
Pennsylvania	: 739	1,285	1,670	1,386	188	108	83
N. E.	1,798	2,581	3,358	2,814	157	109	84
Ohio	: 760	979	1,126	1,044	137	107	93
Indiana	: 381	612	918	762	200	125	83
Illinois	: 509	828	1,159	961	189	116	83
Michigan	: 463	612	826	682	147	111	83
Wisconsin	: 400	692	761	738	184	107	97
Minnesota	: 2,642	3,341	4,176	3,562	135	107	85
Iowa	: 1,581	2,147	2,576	2,288	145	107	89
Missouri	: 1,352	1,532	1,838	1,634	121	107	89
South Dakota	: 1,106	413	496	496	45	120	100
Nebraska	: 891	1,208	1,450	1,288	145	107	89
N. C.	10,085	12,364	15,326	13,455	133	109	88
Delaware	: 111	107	123	118	106	110	96
Maryland	: 403	400	480	430	107	108	90
Virginia	: 784	986	1,232	1,052	134	107	85
West Virginia	: 218	254	318	271	124	107	85
North Carolina	: 230	277	360	299	130	108	83
Kentucky	: 312	267	299	299	96	112	100
Tennessee	: 200	190	200	200	100	105	100
E. C.	: 2,253	2,431	3,012	2,669	118	108	89
South Carolina	: 144	307	414	344	239	112	83
Georgia	: 112	168	202	179	160	107	89
Florida	: 113	118	142	126	112	107	89
Alabama	: 131	144	156	154	118	107	99
Mississippi	: 123	111	113	113	92	102	100
Arkansas	: 115	132	152	141	123	107	93
Louisiana	: 65	69	69	69	106	100	100
Oklahoma	: 1,506	954	1,192	1,192	79	125	100
Texas	: 4,034	3,761	4,701	4,300	107	114	91
SOUTH	: 6,343	5,764	7,141	6,618	104	115	93
North Dakota	: 1,424	992	1,042	1,042	73	105	100
Kansas	: 1,082	943	1,138	1,136	105	120	100
Montana	: 265	253	253	253	95	100	100
Idaho	: 230	272	340	290	126	107	85
Wyoming	: 216	167	199	199	92	119	100
Colorado	: 858	361	990	918	107	107	93
New Mexico	: 63	52	57	57	90	110	100
Arizona	: 71	93	107	99	139	106	93
Utah	: 739	1,743	1,952	1,857	251	107	95
Nevada	: 51	40	51	51	100	128	100
Washington	: 683	1,387	1,637	1,479	217	107	90
Oregon	: 1,579	2,084	2,605	2,221	141	107	85
California	: 2,971	4,260	4,942	4,542	153	107	92
WEST	10,232	13,152	15,313	14,144	138	108	92
UNITED STATES	30,716	36,342	44,150	39,700	129	108.2	89.9



Suggested
Production Goals
1946

HOGS -- 1946 Spring Pig Crop

Summary

The suggested goal for the 1946 spring pig crop is 52 million head. Feed supplies in prospect and the number of livestock to be fed in 1945-46 indicate that the carry-over of corn and other feeds at the end of the 1945-46 season may be somewhat larger than at the beginning of the season, but the situation with respect to probable total meat supplies, possible foreign outlets for meat, and prospective consumer income in 1947 does not appear to justify a pig crop in 1946 much, if any, larger than that of 1945.

Recommendations as to the desired goal for the 1946 fall pig crop will be deferred until next spring, but assuming a fall crop about equal to the 35 million pigs now indicated for 1945, a yearly total of 87 million pigs is suggested as a basis for forecasting pork production in 1947, the year that the bulk of the pigs farrowed in 1946 will be sold for slaughter. This number of pigs would supply about 78 million hogs for slaughter, and at average slaughter weights of the last 5 years would yield about 10.6 billion pounds of pork.

Production of meats other than pork in 1947 probably will be as large as in 1945, and total meat output in that year, assuming a 1946 pig crop of 87 million head, might be expected to be about 22.9 billion pounds, or about 161 pounds per capita. Per-capita production in 1944, the peak year, was 176 pounds, and the average for 1937-41 was about 134 pounds.

Only tentative estimates can be made now of probable requirements of meat for military use and for export in 1947, but it is assumed that these will not exceed 1.5 billion pounds, thus leaving about 21.4 billion pounds for domestic civilian use. This would represent a per-capita supply for civilians of 153 pounds, which would be the largest in more than 30 years, and 20 pounds, or 15 percent more than the average per-capita consumption in the 5 years 1937-41 of 133.4 pounds.

Legal provisions for government support of hog prices require that prices be supported so as to maintain them at a level of not less than 90 percent of parity. This level at present is slightly above \$11 for the United States average, computed on the basis of the U.S. farm price. The U.S. farm price is now about \$14, but if allowance is made for the subsidy of \$1.70 now paid to slaughterers, the farm price of hogs with pork and lard prices at present ceilings is slightly above \$12, or about \$1 above 90 percent of parity.

The level of hog prices is determined in large part by the level of national income and the supply of meats available to consumers. Probable national income per capita in 1947 is tentatively forecast to be about 54 percent greater than in the pre-war years of 1937-41 and about 15 percent lower than in 1944. With this level of consumer income and the probable supply of meats in prospect, it is probable that livestock prices in 1947 will be maintained at a level not greatly different from that now prevailing without the necessity of government price support, but if national income should be substantially lower than the present forecast, a large measure of government price support for livestock would be necessary.

Suggested Goal for 1946 Spring Pig Crop

The suggested goal for the 1945 spring pig crop is 52 million head. A pig crop of this number would be about equal to the 1945 spring crop and also the average of the last 10 years, but it would be nearly 11 percent below the average of the last 5 years when the need for meats for the war effort was very great.

State Production Adjustment Committees in their reports submitted in the late summer were almost unanimous that the 1946 spring crop should be larger than the spring crop of 1945 (about 12 percent). In only two States was a decrease recommended, and only six States suggested no change from the preceding year.

The Committees suggested a small increase, 2 percent, in the fall pig crop of 1946, although five of the North Central States suggested decreases. These recommendations were made in July on the basis of continuing large military requirements which do not appear probable now and when corn crop prospects were uncertain. By regions, the recommended percentage increases were as follows:

	<u>Spring</u>	<u>Fall</u>
Northeast	15	7
North Central	11	- 2
East Central	14	6
South	9	8
West	27	20
United States	12	2

In 1944, the State Committees suggested that the number of sows to farrow in the spring of 1945 be 2 percent less than the number farrowed in the previous spring and that fall farrowings in 1945 be increased 12 percent over a year earlier. The June 1945 pig survey showed a decrease of 11 percent in 1945 spring farrowings and a prospective increase of 12 percent in fall farrowings, the latter being equal to the increase suggested by the State Committees.

On the average about 89.5 percent of the pigs saved are accounted for in total hog slaughter. A pig crop of 52 million head, therefore, would supply about 46.5 million hogs for slaughter. Most of the pigs saved in the spring of 1946 would go into the slaughter supply from late September 1946 to the end of April 1947. Recommendations as to the desired goal for the 1946 fall pig crop will be deferred until next spring, although at present a crop about equal to the indicated 1945 fall crop of 35 million head might be tentatively considered, thus making a possible yearly total for 1946 about the same as the 87 million reported saved in both 1944 and 1945. This number of pigs would supply about 78 million hogs for slaughter in 1946-47, and at average slaughter weights of the last 5 years would yield about 10.6 billion pounds of pork.

Pork output in 1945 is now indicated to be about 10 billion pounds, and a slightly larger output is expected in 1946. In 1943, the record year, the total was 13.3 billion pounds and the average for 1939-41, when production was slightly above the level of the early thirties, was 9.4 billion pounds.

Basic Factors for Determining Hog Goals

In determining the desired production of hogs in the years immediately ahead, consideration needs to be given to maintaining feed supplies and livestock numbers in the relationship which, over the long period, will be to the best advantage of both feed and livestock producers. Consideration also needs to be given to the probable maximum number of hogs that can be marketed at not less than official support price levels with a minimum of government purchasing of pork to maintain these levels.

Determining the desired balance between livestock and feed production involves consideration of probable future yields of feed crops, but in view of their uncertainties, decisions must be made largely on the expectation that these yields will be average, although making allowance for possible below-average harvests. Available feed supplies for 1945-46, as indicated by the October crop report, are sufficient to feed 52 million spring pigs in 1946, maintain about the same volume of other livestock production as in 1945, and have at the end of the feeding year a carry-over of feed grains about equal to that on hand at the end of 1944-45. It is probable, however, that milk, egg, and poultry production in 1946 will be less than in 1945, and that the carry-over of feed grains in the fall of 1946 may be slightly larger than a year earlier if the recommended spring pig goal is not exceeded. Although such a carry-over would be above minimum requirements,

it would not be large in relation to livestock numbers. These estimates assume a rate of feed utilization per unit of livestock production equal to the average of the last three years. In view of the uncertainties with respect to the proportion of soft corn in the 1945 crop and its effect on the rate of feeding, it seems desirable to allow for a carry-over of feed grains at least as large as in 1945.

Factors Affecting Level of Hog Prices

Determining the number of hogs that can be marketed at support price levels with a minimum of government purchasing involves consideration of the probable level of national income at the time the hogs will be sold for slaughter and also the probable supplies of other meats that will be in competition with the pork supply. Measured in terms of disposable income, the national yearly total of such income rose from slightly below 70 billion dollars in the immediate pre-war years to about 138 billion in 1944, or from about \$500 to \$989 per capita. Current forecasts of probable disposable income in 1947 indicate that it likely will be around a level of 120 billion dollars, or about \$840 per capita.

The supply of meat to compete with pork during the next few years is expected to be large in comparison with that of pre-war years. (See table 1.) The increase in supplies of competing meats will be in beef, veal, and poultry, as supplies of lamb and mutton will be down considerably because of the sharp drop in sheep numbers during the war period. Excluding poultry, supplies of meats other than pork will probably average between 80 and 90 pounds per capita during each of the next two or three years. In the four years 1937-40, the per-capita yearly supply of these competing meats, excluding poultry but including imported meats, totaled about 69 pounds. If the current level of output of beef and veal is maintained through 1946 and 1947 as now seems likely, the per-capita supply of competing meats will be at least 25 percent greater than the pre-war average and, therefore, would adversely affect the demand for pork.

With a probable supply of about 12.3 billion pounds of other meats in prospect and assuming 10.6 billion pounds of pork from a yearly pig crop of 87 million head, the total output of meat in 1947 would be approximately 22.9 billion pounds, or 161 pounds per capita for the population of 142.5 million now forecast. The indicated distribution of the total meat production for domestic and military uses and for export for the year beginning October 1946 is shown as follows:

Meat Production and Distribution 1946-47 (billions of pounds)

<u>Production</u>	
Pork	10.6
Other Meats	<u>12.3</u>
Total	22.9
<u>Consumption and Exports</u>	
Military Requirements	.9
Exports	.6
Total	<u>1.5</u>
<u>U. S. Civilians</u>	21.4

The estimates of military requirements of 900 million pounds and of exports of 600 million pounds are highly tentative and can be considered only as rough indications. The volume of exports suggested is four times as great as the 1936-40 average. On the basis of these estimates the total volume of meats available for domestic civilian consumption for 1946-47 is 21.4 billion pounds, or about 153 pounds per capita. This level of per-capita consumption is the largest in more than 30 years, and it is nearly 20 pounds or 15 percent greater than the average per-capita consumption in the 5 pre-war years, 1937-41, of 133.4 pounds.

National per-capita income (disposable) for 1947 has been tentatively estimated at a level about 54 percent greater than in the pre-war years 1937-41, and about 15 percent lower than in 1944. With this level of consumer income and the prospective supply of meats available, it is probable that livestock prices will be maintained at a level not greatly different from that now prevailing without the necessity of government price support. It should be recognized, however, that the indication of national income given is for a period beginning 12 months from this fall, and in view of the numerous problems connected with reconversion of industry to a peacetime basis, any estimate made now of probable national income in 1947 is necessarily subject to a wide margin of error. If the national income in 1947 should be substantially lower than present estimates, a large measure of government price support for livestock would be necessary.

Price Supports

The legal provisions for government price support of hogs require that (during 1946 and 1947 at least) hog prices be supported through government action at a level of not less than 90 percent of parity. In September 15, 1945, the U.S. farm price was \$14.10 and the parity price was \$12.60, thus making the prescribed support level \$11.36, which is equivalent to slightly less than \$12 Chicago basis. Chicago average prices are usually about equal to the U.S. average price paid by slaughterers. The average paid by slaughterers during the first 8 months of 1945 was \$14.53. Slaughterers during this period received a subsidy which averaged about \$1.49 to enable them to pay the current level of hog prices while wholesale and retail pork prices were held at the ceilings required under Price Control regulations. Without subsidy payments the level of hog prices received by farmers, with meat prices at current levels, would be between \$12 and \$13, or a little higher than the required support level.

The Hog-Corn Price Ratio as a Factor Determining Hog Production

The present hog-corn price ratio is not sufficiently favorable to encourage farmers to expand hog production to any great extent. Based on farm prices, the September ratio was 12.6 for the United States and 13.3 for the North Central States (Corn Belt). A year earlier, it was 11.7 and 12.9, respectively.

In previous years (1924-1944), producers increased the number of sows for spring farrowing when the hog-corn price ratio during the breeding season (September-December) averaged above 12.5 for the United States and above 13.5 for the Corn Belt. (See table 2.) The only year that farrowings were increased when the United States ratio was below 12.5 was in the spring of 1931. A possible explanation for this exception is the fact that farrowings had been reduced in each of the three previous years, 1928, 1929, and 1930, and the cumulative reduction amounted to 15 percent.

Table 1.

Meat Production and Consumption and Pork Exports, 1935-44,
and Tentative Forecast, 1945-47

Year	Meat Production						Consumption				Pork
	Total (bil. lbs.)			Per Capita (lbs.)			Total (bil. lbs.)		Per Capita (lbs.)		Exports
	Other	All		Other	All		Other	All	Other	All	(bil. lbs.)
Year	Pork	Meats	Meats	Pork	Meats	Meats	Pork	Meats	Meats		1/
1935	5.9	8.5	14.4	46.2	66.5	112.7	14.8	48.1	67.8	115.9	.136
1936	7.5	9.3	16.8	58.0	72.1	130.1	16.4	54.8	72.7	127.5	.118
1937	7.0	8.8	15.7	53.6	67.6	121.2	16.3	55.4	70.0	125.4	.114
1938	7.7	8.8	16.5	58.8	67.3	126.1	16.5	57.8	63.5	126.3	.153
1939	8.7	8.9	17.5	65.7	67.4	133.1	17.5	64.3	68.5	132.8	.192
1940	10.0	9.0	19.0	75.0	68.0	143.0	18.7	72.4	68.6	141.0	.163
1941	9.4	10.0	19.5	70.5	74.9	145.4	18.8	66.5	74.9	141.4	.569
1942	10.7	11.0	21.7	79.1	81.3	160.4	18.2	61.5	76.4	137.9	1.610
1943	13.3	10.8	24.1	97.2	78.5	175.7	17.8	72.4	63.9	136.3	2.201
1944	12.9	11.8	24.6	92.8	84.6	177.4	19.4	76.7	72.9	149.6	1.690
1945	10.1	12.4	22.4	71.7	88.0	159.7	16.7	--	--	129.0	1.100
1946	10.5	12.5	23.0	74.2	88.3	162.5	--	--	--	--	--
1947	10.6	12.3	22.9	74.4	86.3	160.7	21.4	--	--	153.0	.600

1/ Pork exports in 1941-45 include lend-lease shipments.

Table 2.

Relation of Hog-Corn Price Ratio During Breeding Season, September-December,
to Increase and Decrease in Sows Farrowing Spring Pig Crop

Year	Hog-Corn Ratio		Sows Farrowing Next Spring (thousands)	Increase or Decrease	
	September-December			From Previous Year in	
	U. S.	North Central States		Sows for Spring Farrow	Thousands
1938	17.2	18.9	8,692	1,897	27.9
1942	17.2	18.4	12,136	2,436	25.8
1926	16.6	17.5	9,754	706	7.8
1941	15.5	16.3	9,650	1,914	24.7
1937	15.3	16.7	6,795	618	10.0
1935	14.7	15.8	6,954	1,487	27.2
1932	14.2	17.4	9,122	312	3.5
1925	13.5	15.3	9,048	714	8.6
1943	12.5	13.5	9,187	- 2,949	- 24.3
1944	12.3	13.4	8,204	- 983	- 10.7
1939	12.1	13.3	8,243	- 449	- 5.2
1931	12.0	13.0	8,810	- 159	- 1.8
1927	11.2	11.7	9,301	- 453	- 4.6
1928	11.2	12.2	8,854	- 447	- 4.8
1930	11.2	12.3	8,969	691	8.4
1929	10.3	10.9	8,278	- 576	- 6.5
1940	10.0	10.6	7,736	- 507	- 6.1
1933	8.6	10.2	6,825	- 2,297	- 24.2
1924	8.3	8.7	8,334	- 1,465	- 14.9
1934	6.8	7.0	5,467	- 1,358	- 19.9

Table 2.

1946 State Goals

HOGS: Sows to Farrow, Spring (Dec. 1 to June 1)

State	1946 Goal	1937-41 Average	1945	Percent 1946 Goal is of	
				1937-41 Average	1945
	1,000 head	1,000 head	1,000 head	percent	percent
Maine	6	6	6	100	100
New Hampshire	2	2	2	100	100
Vermont	3	3	3	100	100
Massachusetts	14	14	14	100	100
Rhode Island	1	1	1	100	100
Connecticut	3	2	3	150	100
New York	25	28	22	89	114
New Jersey	10	13	10	77	100
Pennsylvania	65	70	63	93	103
Northeast	129	139	124	93	104
Ohio	365	386	360	95	101
Indiana	560	500	546	112	103
Illinois	835	720	834	116	100
Michigan	100	115	100	87	100
Wisconsin	315	296	315	106	100
Minnesota	685	642	669	107	102
Iowa	1,897	1,594	1,861	119	102
Missouri	465	376	470	124	99
South Dakota	355	225	337	158	105
Nebraska	508	326	481	156	106
North Central	6,085	5,180	5,973	117	102
Delaware	3	3	3	100	100
Maryland	25	25	24	100	104
Virginia	75	75	72	100	104
West Virginia	18	23	17	78	106
North Carolina	100	113	95	88	105
Kentucky	130	138	129	94	101
Tennessee	130	139	122	94	107
East Central	481	516	462	93	104
South Carolina	67	67	65	100	103
Georgia	165	187	161	88	102
Florida	95	82	93	116	102
Alabama	110	117	109	94	101
Mississippi	105	105	103	100	102
Arkansas	115	136	114	85	101
Louisiana	125	126	119	99	105
Oklahoma	106	112	106	95	100
Texas	175	197	187	89	94
South	1,063	1,129	1,057	94	101
North Dakota	145	99	139	146	104
Kansas	210	154	203	136	103
Montana	32	22	32	145	100
Idaho	35	54	36	67	100
Wyoming	10	10	10	100	100
Colorado	42	37	40	114	105
New Mexico	9	10	11	90	80
Arizona	4	5	4	80	100
Utah	11	14	11	79	100
Nevada	3	3	3	100	100
Washington	25	35	24	71	104
Oregon	20	37	20	54	100
California	55	85	55	65	100
West	602	565	588	107	102
U. S.	8,360	7,529	8,204	111	102

1/ This number of sows with litters saved equal to 5-year average 1941-45 (6.22 pigs) would farrow a pig crop of 52 million head.

Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

BEEF CATTLE

Summary: The suggested goal for beef cattle in 1946 is for a total slaughter of about 35 million cattle and calves, and if attained would yield about 11.6 billion pounds of beef and veal. This, together with the supplies of other meats in prospect, would provide a total of slightly more than 23 billion pounds of meat in 1946. Allowing for anticipated military requirements and probable exports, the per-capita supply remaining for civilians in 1946 would be about 150 pounds. Civilian meat consumption in 1945 under rationing control is now indicated to be about 130 pounds.

A slaughter of 35 million cattle and calves in 1946 would reduce total cattle numbers to about 78.5 million by the end of the year, or to a level about 4 million head below the record peak reached at the end of 1943. This total is about the number recommended by State Committees on goals and production capacity during the last two years as being the desired level for the available feed and pasture resources of the country under average growing conditions.

Reductions in horse and mule numbers over the last 25 years has made possible a larger production of cattle and sheep without exceeding production capacity, and the sharp reduction in sheep numbers since the end of 1941 resulted in additional capacity for cattle production. Total animal grazing units at the beginning of 1945, however, were about 7 percent greater than the long-time average, although slightly smaller than the recent peak reached a year earlier. In some areas the number of grazing units now appear to be excessive for the production capacity under average conditions, and some reduction in numbers seems desirable. With cattle prices considerably above prewar levels, pork production below average, and a strong domestic demand for meat indicated in prospect during 1946 and 1947, this seems to be an opportune time for the cattle industry to market cattle heavily and reduce numbers to a level more nearly in line with average feed resources.

Goal Recommendations: The suggested goal for beef cattle in 1946 is for a total slaughter of about 35 million cattle and calves. A slaughter this large would probably reduce cattle numbers to about 78.5 million head by the end of 1946, or about 4 million below the peak number reached at the end of 1943. The reduction would be a continuation of the downward trend in numbers which started in 1944, following an increase of 17 million head during the six years 1938-43. Numbers decreased 600,000 head in 1944, when 33.7 million cattle and calves were slaughtered, and a further decrease of about 1.5 million is expected by the end of 1945.

Increases and decreases in cattle numbers are determined primarily by the rate of cattle and calf slaughter and the size of the calf crop, since imports and exports of cattle and calves are relatively insignificant and death losses in most years are fairly stable. The 1945 calf crop is expected to total about 35.5 million head, compared with 34.7 million in 1944, and it is assumed that the 1946 crop will be slightly less than 35 million as a result of a moderate reduction in cow numbers by the end of this year.

If cattle numbers are reduced to slightly above 78 million head by the end of 1946 this would represent a decrease of about 5 percent from the peak numbers reached at the end of 1943. In the first three years of the downswing from the cyclical peak reached in 1904, numbers were reduced 4 percent, and in a similar period following the peak reached in 1918, the reduction was 6 percent. A reduction of 11 percent occurred in the first 3 years following the cyclical peak reached in 1934, but much of this resulted because of the slaughter of the large number of cattle purchased by the Government as a drought relief measure in 1934-35.

State Agricultural Goal Committees in the fall of 1943 recommended reductions in cattle numbers that would bring the national total to slightly below 77 million head by the end of 1944. In the fall of 1944, when it was apparent that this reduction would not be achieved, they recommended a goal of 77.3 million head by the end of 1945. State Production Adjustment Committees reporting on production capacity in the fall of 1944 recommended that numbers be reduced to 78.4 million by the end of 1945, and this past summer they suggested a total of about 79 million by the end of 1946. These opinions as to the most desirable level of total cattle numbers for the available feed and pasture resources of the country under prospective conditions tend to establish that level within a range of 77 to 79 million head.

A slaughter of 35 million cattle and calves in 1946, with an average proportional distribution, would yield about 11.6 billion pounds of beef and veal. This with the supply of other meats in prospect would make a total meat output in 1946 of slightly more than 23 billion pounds, and after allowing for anticipated military requirements and probable exports would provide about 150 pounds of meat per capita for domestic civilian consumption.

Production Capacity: The production of cattle, especially those raised for beef, is primarily dependent on the available pasture, hay, and forage, and cattle production capacity is determined by the extent of these feed resources and the number of other grazing animals which compete with cattle for them. Since 1918, the number of horses and mules has been decreasing and the total now is less than half that in the early twenties, thus making more of the range and pasture available for cattle and sheep. During the long downward trend in horse and mule numbers, cattle and sheep numbers have fluctuated through wide cycles and during the recent war period both reached new all-time highs which might appear to be excessive for the production capacity of the country. The increase in cattle and sheep numbers, however, was in part offset by the reduction in horses and mules; hence, total animal grazing units at the recent peak level reached at the beginning of 1944 was only 8 percent above the long-time average (1920-1944), and 18 percent above the low point of the last 45 years reached in 1928. Compared with the all-time peak reached in 1918, it was down slightly more than 4 percent.

Reductions in all classes of livestock in 1944 brought the total of all grazing units at the end of the year to 6.6 percent above the long-time average and a further reduction is indicated in 1945. The total for the country as a whole in 1946, therefore, does not appear to be excessive if average or better weather conditions prevail.

The relative changes between the high and low points in the number of animal grazing units in the different regions of the country during the last two decades is shown in Table 1 which also indicates in a general way the extent to which the number of grazing units in 1944 and 1945 may have been in excess of productive capacity under average weather conditions. Regions in which numbers were relatively high at the beginning of 1945 are the South Central States east of Texas and Oklahoma, the South Atlantic States, the Northern Plains States, and the Corn Belt States east of the Missouri River. The increase in the Corn Belt and Southern regions reflects to a considerable extent the improvement in hay and pasture resources in these regions during the last decade, especially the greater use of legumes for pasture and hay crops; hence, although the number of grazing units in these regions is now much above average, it may not be excessive for the feed resources available.

Since the end of 1941, sheep numbers have decreased at least 20 percent, thus making more of the range and pasture available for cattle, especially in the Western States where both cattle and sheep are of major economic importance. Also favoring an expansion in cattle numbers in recent years has been the continuing favorable weather since the summer of 1938, especially in the Great Plains Area, and some of the western Mountain States, where extended periods of drought often occur. Only once in the last 60 years, 1902-1910, has there occurred a similar period of 8 consecutive favorable growing seasons for range and feed crop production. This long period of better than average weather since 1938 made it possible to increase cattle breeding herds on a large scale, and a further stimulant to such action was a rise of more than 70 percent in cattle prices from 1938 to 1943, resulting because of the war.

From 1938 to the end of 1943, cattle numbers increased by 17 million head to an all-time peak level, or about 26 percent. Approximately 36 percent of this increase, or nearly 6.2 million head, was in cows, heifers, and heifer calves kept for milk. Cows and heifers kept for beef also increased 6.2 million head, or 47 percent from 1939 to 1945.

Compared with the 15-year average of 1930-44, the percentage increase in beef cattle numbers has been relatively greatest in the 12 Southern States east of Texas and Oklahoma and in the 8 North Central States east of the Missouri River. The number of beef cattle in the South at the beginning of 1945 exceeded the 15-year average by 32 percent, and in the North Central group the increase amounted to 30 percent. In the 17 Western States the increase over the average was 21 percent. The trend in cattle numbers in the south has been generally upward since 1927-28, with only a moderate recession occurring after the mid-thirties when the Western States reduced numbers sharply because of droughts.

Part of the beef cattle reported in the North Central States represents cattle on feed, many of which originated in the western range States. Cattle numbers in this area, therefore, tend to vary somewhat with fluctuations in cattle feeding, but the trend in numbers of cattle produced in the area has been generally upward since 1928, with only moderate decreases occurring during and after the 1934 drought.

The committees reporting on production capacity last summer recommended that most of the reduction in cattle numbers they proposed be made in the Great Plains and Western States. Small reductions were suggested in the North Central States east of the Missouri River. In most of the Southern States east of Texas and Oklahoma and in the Northeast further increases were suggested.

In several of the 17 range States, especially the Great Plains States, where cyclical changes in cattle numbers are usually most pronounced, numbers now are near the maximum carrying capacity, even under favorable grazing conditions, and further reductions are needed to bring numbers in balance with feed resources when less favorable weather recurs. In these range States, where beef cattle production provides a most effective way of utilizing the valuable forage resources found there, and where fluctuating weather and feed supplies make cattle production somewhat hazardous, it is essential that rates of stocking be consistent with the carrying capacity of the range and the supplemental feed supplies that may reasonably be expected to be available. Otherwise, producers are confronted with the risk of being forced to dispose of their cattle when they are below average in condition and demand for beef may be less favorable.

The reports of State Committees suggest some reduction in the number of beef cows in all of the Great Plains and Western States. More reduction is suggested, however, in North Dakota, Kansas, Colorado, Nevada, Oklahoma, and New Mexico than in other Western States.

In the North Central States east of the Missouri River, the continued decrease in the number of horses and mules, the shift to better quality hays and the good pasture-growing weather in recent years has favored maintaining larger cattle herds despite the wartime reduction in the acreage of plowable pasture. State Committees in all of these States, except Wisconsin, suggest a reduction in the number of all cattle and calves during 1946, but it would not exceed 2 percent in any State except Minnesota and Missouri. Prospects for an early return to larger acreages of hay and pasture are an influence on future adjustments in the number of cattle in these States.

About 17 percent of all the cattle and calves are in the Southern States, excluding Texas and Oklahoma. The number of cattle has increased steadily in the South during the last several years. This increase has generally been based upon improvements in the local forage situation and State Committees in most southern States suggest a further increase in 1946. Even so, the total beef output in that area probably could be increased more economically by less emphasis on increasing numbers and more emphasis on better feeding and better management.

Some expansion in cattle feeding is suggested by the committees in the leading Corn Belt States and in all but one of the Western States, but decreases were suggested in Indiana, Missouri and Wisconsin.

Problems in Attaining Goals: With the aid of favorable weather and abundant feed production during the war years, cattle numbers and beef production were increased sharply to record levels. Thus, the western cattlemen used their increased feed supplies to produce beef when it was most greatly needed. With prices far above normal peacetime levels, the cattle industry has experienced the most profitable series of years on record. Present cattle numbers are about the maximum that can be maintained in years of favorable weather. In view of the possibilities of a near recurrence of less favorable feed years and that cattle prices may decline considerably from present levels, it would seem that the best policy for the industry as a whole is to market heavily and reduce numbers to a level more nearly in line with average production capacity while cattle are in good condition and prices are high.

Reducing cattle numbers involves selling more cows and heifers for slaughter and retaining fewer calves for herd replacement. At least three-fourths of the total increase in cattle numbers since 1938 has been in she-stock. Except for the relatively small number of cows and heifers fed on grain, the marketing season for she-stock is largely in the second half of the year after they have been fattened on grass. This results in relatively large supplies of the lower grades of beef during that period, and if marketings are greatly expanded, then a problem of price maintenance is likely to occur. Increasing early marketings of grass cattle wherever possible will assist to some extent in preventing this situation.

In view of the relative abundance of roughage and other feed in most sections of the country and the comparatively small supplies of hogs for slaughter in 1945-46, an expansion in cattle feeding during the 1945-46 season seems desirable. Demand for meats is expected to continue strong and increased beef output is needed to supply this demand. An increase in cattle feeding will tend to result in a more even distribution of beef supplies through the year.

Long-time Production Policies: The nature of the cattle industry is such that cattlemen have to make their production plans on a long-time basis rather than year to year, consequently in developing a goal for the industry for 1946, consideration needs to be given to probable objectives over a longer time period, especially as they relate to the meat requirements of our increasing population which is expanding at the rate of about one million people annually. During the last three years the goals recommended have called for a rate of slaughter which would reduce cattle numbers to a level that would bring them in better relation to probable feed resources when less favorable weather conditions occur.

The cyclical downswing in cattle numbers started in 1944 and if it follows the usual pattern it is likely to extend over a period of five or more years and result in numbers being reduced more than may be desirable. Consideration needs to be given, therefore, to the number of cattle that will be needed to provide adequate supplies of beef and veal for domestic use during the years immediately following 1946 (1947 to 1950) so that producers may plan accordingly. Population in 1950 probably will total about 146 million, or at least 5 million more than in 1945. If it is assumed that 150 pounds of meat per capita is the minimum desired level that should be provided, a total of 21.9 billion pounds will be required in 1950, and if this supply includes beef and veal in the average proportion of the last 25 years the yearly beef and veal requirements will amount to nearly 10.4 billion pounds. To obtain this supply would require the slaughter of around 30 million cattle and calves, and if cattle numbers were to be maintained at a stable level this would require a yearly calf crop of 32 to 33 million head, assuming yearly imports of cattle and calves of about one half million head. A calf crop of this size would require a breeding herd of beef and dairy cows numbering 38 to 39 million head, or about 3 to 4 million less than the number estimated at the beginning of 1945. Assuming the usual proportions of other age and sex groups, the total of all cattle would be about 74 to 75 million head. This would be about the minimum level to which cattle numbers should be permitted to decline in the present cyclical downswing, and if it is desired that the meat supply for domestic use exceed 150 pounds per capita or include a larger than normal proportion of beef and veal, a higher level of numbers would be needed to maintain this output.

Cattle Slaughter in 1945: Combined slaughter of cattle and calves in federally inspected plants during the first 10 months of 1945 was only slightly larger than a year earlier, an increase of 6 percent in cattle slaughter being offset by a reduction of 9 percent in calf slaughter. Cattle slaughter included a larger proportion of steers and relatively fewer cows and heifers than in 1944. The supply of grain fed steers from May to mid-October was the largest in several years and probably included about the largest proportion on record of steers grading Good and Better.

In 1944, the slaughter of cows was unusually large from June to the end of the year and continued large during the first three months of 1945. Since March, however, cow slaughter has been relatively small and as the seasonal peak of such slaughter (October-November) approaches, there is no evidence of any tendency to market more than the usual proportion of cows.

Calf slaughter in 1944 was far above any previous year and accounted for much of the increase in the combined slaughter of cattle and calves over all other years. Slaughter of calves in federally inspected plants continued heavy through the first quarter of 1945, but from April to October the total each month has been less than that of a year earlier, although much larger than average.

Records of uninspected commercial slaughter of cattle and calves in 1945 are available only for the first five months and these show an increase of about 30 percent over a year earlier for both cattle and calves. Part of this increase represents the slaughter of some concerns from which reports were not received in the early part of 1944, but it is not certain that these concerns were operating at that time. Since federally inspected slaughter, both in regular and war duration plants, failed to maintain the increase over 1944 from May to October that it did in the January to April period, it is assumed that the uninspected plants probably did not continue to hold as high rate of increase after April as in the earlier months, but it probably was sufficient to make this yearly total about one million head larger than in 1944. With this assumption the total slaughter of cattle and calves in 1945 is indicated to be about 35 million head, which was the slaughter goal suggested for the year.

BEEF CATTLE: Animal Grazing Units by Geographical Regions

Table 1

Region	:Low Point :of Twen- :ties	High Point :of Early :Thirties	:Low Point :of Late :Thirties	: : 1944	: : 1945
North Atlantic States	94.4	99.1	96.2	99.9	100.1
South Atlantic States	90.3	102.2	95.8	110.7	109.8
South Central					
East of Texas-Okla.	88.8	106.1	98.8	116.8	115.5
Eight Lake & Corn Belt States	91.0	102.7	97.1	109.3	107.3
Texas-Oklahoma	89.3	112.7	95.2	105.9	103.5
Four Northern Plains States	94.6	115.4	79.7	107.6	108.5
Mountain States	95.0	109.1	87.8	103.6	100.0
Pacific States	94.2	104.3	99.7	110.9	105.2
United States	91.9	106.2	94.4	108.4	106.6

CATTLE AND CALVES: Suggested Number on Farms Jan. 1, 1946 and 1947, Imports, Calf Crop, and Slaughter with Comparisons

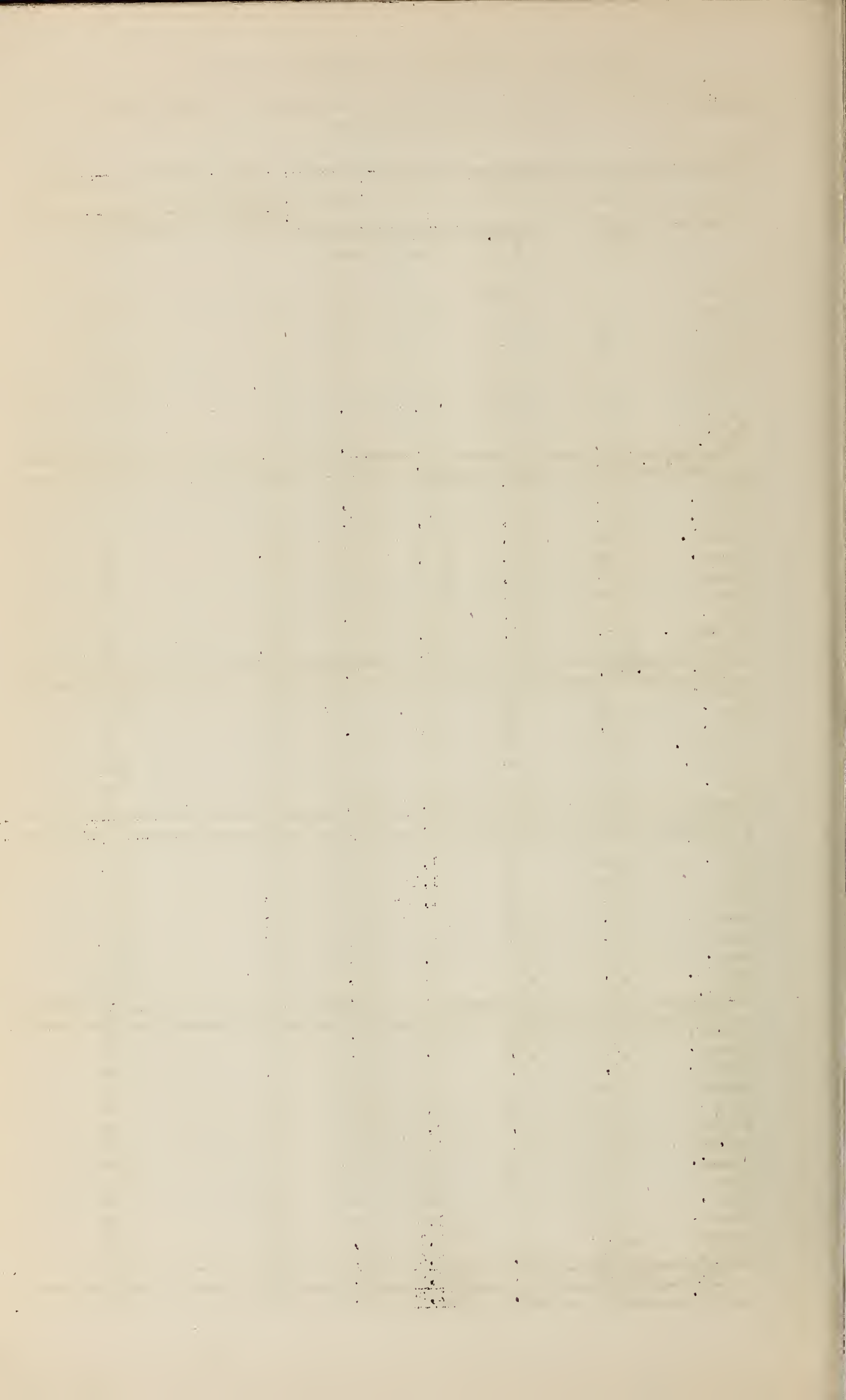
Table 2

	1941:1942	:1943	:1944	:1945	:1946	:1947
	(million head)					
Milk Animals on farms Jan. 1						
Cows 2 years old and over	25.5	26.4	27.1	27.7	27.8	27.4
Heifers 1-2 years	5.7	5.8	6.0	6.2	6.2	6.0
Heifer calves	6.2	6.6	6.9	7.0	6.6	6.2
Total milk stock	37.4	38.8	40.0	40.9	40.6	39.6
Other cattle on farms Jan. 1						
Cows 2 years old and over	11.2	12.1	12.9	13.8	14.4	14.2
Heifers 1 - 2 years	3.8	4.0	4.4	4.8	4.8	4.7
Steers 1 year and over	5.9	6.4	6.9	7.5	7.6	7.5
Bulls 1 year and over	1.7	1.7	1.8	1.9	1.9	1.8
Other calves	11.5	12.2	13.1	13.5	12.5	12.4
Total other cattle (beef)	34.1	36.4	39.1	41.5	41.2	40.6
Total all cows	36.7	38.5	40.0	41.5	42.2	41.6
Grand total all cattle	71.5	75.2	79.1	82.4	81.8	80.2
Calf Crop	31.1	32.9	33.2	34.7	35.5	34.9
Imports of cattle & calves	.7	.7	.6	.3	.4	.5
Into sight	31.8	33.6	33.8	35.0	35.9	35.4
Total supply cattle & calves	103.3	108.8	112.9	117.4	117.7	115.6
Disappearance						
Slaughter						
Cattle-Federally inspected	10.9	12.3	11.7	14.0	14.9	
Non-inspected	5.5	5.7	6.0	6.1	6.7	
Total	16.4	18.0	17.7	20.1	21.6	21.0
Calves-Federally inspected	5.5	5.8	5.2	7.8	7.2	
Non-inspected	3.8	3.9	4.7	5.8	6.2	
Total	9.3	9.7	9.9	13.6	13.4	14.0
Total slaughter	25.7	27.7	27.6	33.7	35.0	35.0
Other disappearance	2.4	2.0	2.9	1.9	2.5	2.0
Total disappearance	28.1	29.7	30.5	35.6	37.5	37.0
Number end of year	75.2	79.1	82.4	81.8	80.2	78.6
Change from previous year	+ 3.7	+ 3.9	+ 3.3	- 0.6	- 1.6	- 1.6

CATTLE AND CALVES: Suggested State Goals for Numbers on Farms at End of 1946 with Comparisons

Table 3

State and Region	1946 Goal : Year	1937-41 : Average	1944 : 1944	1945 : 1945	Percentage 1946 Goal (end of year) is of 1937-41	Percentage 1946 Goal (end of year) is of 1945
	1,000 head	1,000 head	1,000 head	1,000 head	Percent	Percent
Maine	229	231	226	226	99	101
N. H.	126	124	122	124	102	102
Vt.	458	438	454	463	105	99
Mass.	203	196	202	200	104	101
R. I.	31	29	30	30	107	103
Conn.	191	177	191	189	108	101
N. Y.	2,200	2,059	2,162	2,184	107	101
N. J.	216	198	215	215	109	100
Pa.	1,575	1,475	1,607	1,623	107	97
N. E.	5,229	4,927	5,209	5,254	106	100
Ohio	2,200	1,995	2,306	2,283	110	96
Ind.	1,850	1,627	1,932	1,893	114	98
Ill.	3,168	2,781	3,244	3,244	114	98
Mich.	1,976	1,686	2,036	2,016	117	98
Wis.	3,950	3,381	3,947	3,986	117	99
Minn.	3,535	3,356	3,833	3,795	105	93
Iowa	5,260	4,632	5,584	5,528	114	95
Mo.	3,100	2,542	3,486	3,347	122	93
S. Dak.	2,285	1,580	2,367	2,485	145	92
Nebr.	3,700	2,923	3,890	4,004	127	92
N. C.	31,024	26,503	32,625	32,581	117	95
Del.	63	52	61	62	121	102
Md.	368	322	366	373	114	99
Va.	1,000	876	1,068	1,036	114	97
W. Va.	560	569	622	585	98	96
N. C.	770	599	759	767	129	100
Ky.	1,300	1,196	1,438	1,352	109	96
Tenn.	1,385	1,162	1,513	1,422	119	97
E. C.	5,446	4,776	5,827	5,597	114	97
S. C.	384	535	392	384	115	100
Ga.	1,126	937	1,115	1,126	120	100
Fla.	1,159	830	1,136	1,159	140	100
Ala.	1,268	985	1,255	1,268	129	100
Miss.	1,518	1,282	1,488	1,518	118	100
Ark.	1,340	1,100	1,315	1,341	122	100
La.	1,461	1,159	1,418	1,461	126	100
Okla.	2,800	2,306	3,154	3,091	121	91
Tex.	7,600	7,145	7,745	7,590	106	103
South	18,356	16,079	19,018	18,933	116	99
N. Dak.	1,800	1,256	1,868	1,905	143	94
Kans.	3,700	2,760	3,960	4,039	134	92
Mont.	1,600	1,059	1,757	1,739	151	92
Idaho	880	743	961	961	118	92
Wyo.	980	813	1,033	1,043	121	94
Colo.	1,680	1,436	1,920	1,882	117	89
N. Mex.	1,300	1,273	1,420	1,335	102	97
Ariz.	890	903	959	898	99	100
Utah	520	436	525	541	119	96
Nov.	420	374	435	443	112	95
Wash.	950	788	1,040	998	121	95
Oregon	1,150	936	1,194	1,182	123	97
Calif.	2,380	2,345	2,613	2,430	101	98
West	18,250	15,122	19,685	19,390	121	94
U. S.	78,605	67,407	82,364	81,760	117	96



Suggested
Production Goals
1946

NOT FOR PUBLICATION
For Discussion
Purposes Only

SHEEP AND LAMBS

Summary: The suggested goal for sheep and lambs in 1946 is for a total slaughter of about 20 million head, compared with an expected slaughter in 1945 of 24.3 million. A slaughter of 20 million head in 1946 would leave sheep numbers at the end of the year about unchanged from the expected total at the beginning of the year, which will probably be about 44.8 million head. The slaughter goal suggested, therefore, is the maximum level of slaughter that can be permitted if the downward trend in sheep numbers now in progress is to be checked. Lamb and mutton from this slaughter would total about 820 million pounds, or about 20 percent less than in 1945, and would be the smallest supply since 1934.

Trends in Sheep Production: Heavy liquidation of breeding sheep has been under way since early 1942, and by the end of 1945, it is expected that sheep numbers will be down nearly 21 percent from the all-time peak reached at the beginning of 1942. This is the largest decrease of record in a four-year period and leaves sheep numbers at a very low level in relation to the country's population.

During the liquidation which extended continuously from 1909 to 1917, numbers were reduced 12 percent in the first four years and a total of 23.5 percent in the eight years of the period. After a slight increase in numbers in 1917 and 1918, liquidation was resumed from 1919 to 1923, and the total reduction from the 1909 peak to the 1923 low point amounted to 14 million head, or 27.5 percent. From 1923 to 1932 numbers increased 17 million head, and during most of this period prices of lambs were relatively more favorable than those of cattle. From 1930 to the beginning of 1944, numbers ranged from 51 to nearly 57 million head, but the recent liquidation has reduced the total to below 45 million, or to about the level of 1927-28. To some extent cattle numbers have increased substantially in those areas where sheep numbers have declined most.

The liquidation of sheep since the early part of 1942 resulted largely because of the shortage of competent herders in the western range country and the general scarcity of farm labor in other sections. More favorable returns from other agricultural products also caused some shifting from sheep raising.

In the North Atlantic States the trend in sheep numbers has been steadily downward since 1920, and numbers there now are only half as large as they were 25 years ago. In the South Atlantic States and in the Rocky Mountain and Pacific States numbers have been decreasing since 1931, and at the beginning of 1945 were down 40 percent in both the South Atlantic and Pacific Coast regions, and 29 percent in the Mountain States.

In the Plains States, the Corn Belt, and the South Central States east of Texas-Oklahoma, numbers increased until 1942 and have since decreased, dropping about 20 percent in the Corn Belt and South Central areas, and 24 percent in the Plains States by the end of 1944. In Texas, the largest sheep producing State, numbers continued to increase until 1943 and have since declined 6 percent.

These regional changes in sheep numbers reflect shifts from the eastern and western sections of the country to the central areas. The latter group now has 53 percent of the total sheep in the country as contrasted with 40 percent in 1931 and 36 percent in 1920. Small farm flocks in the East have become fewer in number and sheep raising on public lands in the West with the use of herders apparently has become less and less profitable, thus causing shifts from sheep to other types of agriculture. On the other hand, production on fenced range without herders, as is carried on in Texas, has been generally remunerative, and accounts for the great expansion in that State since 1926. The larger farm flocks in the Plains and Corn Belt States also have tended to be profitable in most years and sheep raising in these areas probably will be continued near the same scale as in the thirties.

Post War Prospects for the Sheep Industry: In appraising the post war prospects for the sheep industry consideration needs to be given to the outlook for wool and the competitive situation for lamb in the total meat supply. The wool situation cannot be considered favorable except under conditions involving Government support of wool prices. World stocks of wool are of record size and prices of foreign wools are well below the Government support prices of domestic wools in this country. The increasing production of synthetic fibers that compete with wool is another unfavorable factor in the wool situation.

Supplies of lamb and mutton during the next few years will be relatively small. During the period from 1920 to 1930, when lamb slaughter was small relative to that in the last decade, the prices of lambs were high in relation to other livestock and sheep numbers expanded markedly. Whether the small supply of lamb in prospect during the next few years will have a similar favorable effect on lamb prices is not so certain. Total supplies of meat during this period are expected to be quite large, both as compared with prewar levels and with the decade following the World War I.

Slaughter of calves is expected to continue at high levels and the supply of poultry meats will be much larger than in any previous period preceding the war. These two types of meat are especially competitive with lamb and the large supplies in prospect may weaken the demand for lamb considerably even though the supplies of lamb are small.

SHEEP AND LAMBS: Suggested number on farms January 1, 1946 and 1947
Lamb crop, imports, and slaughter 1946 with comparisons

Table 1

Item	: 1940	: 1941	: 1942	: 1943	: 1944	: 1945	: 1946
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.
	Head	Head	Head	Head	Head	Head	Head
On farms Jan. 1							
Ewes, 1 year							
Western sheep states	24.9	25.4	26.1	26.2	24.2	23.1	
Native sheep states	11.0	11.3	11.6	11.6	10.5	9.5	
Total	35.9	36.7	37.7	37.7	34.7	32.6	30.3
On feed	5.8	6.5	6.9	7.0	6.6	6.3	6.5
Other	10.7	11.1	12.1	11.0	10.5	8.7	8.0
Grand Total	52.4	54.3	56.7	55.8	51.8	47.9	44.8
Lamb crop	31.3	32.9	32.6	31.3	29.2	28.2	26.1
Imports	.0	.0	.0	.0	.1	.1	.1
Total Supply	83.7	87.2	89.3	87.1	81.1	76.2	71.0
Slaughter							
Federally inspected	17.4	18.1	21.6	23.4	21.9	20.8	
Non-inspected	4.2	4.2	4.0	3.7	3.4	3.5	
Total	21.6	22.3	25.6	27.1	25.3	24.3	20.0
Exports	1/	.0	.0	.0	.0	.0	
Other disappearance	7.8	8.2	7.9	8.2	7.9	7.1	6.2
Total disappearance	29.4	30.5	33.5	35.4	33.2	31.4	26.8
On farms end of year	54.3	56.7	55.8	51.8	47.9	44.8	44.8
Change from previous yr.	+1.9	+2.4	-.9	-4.0	-3.9	-3.1	

1/ Negligible

SHEEP AND LAMBS: Suggested State Goals for Numbers on Farm at End of 1946
with Comparisons.

Table 2

State and Region	1946 Goal : End of Year	:	1937-41 :	1944 :	1945 :	Percentage 1946 Goal (end of year) is of 1937-41	1945
	1,000 head	:	1,000 head	1,000 head	1,000 head	Percent	Percent
Maine	36		44	42	38	82	95
N. H.	10		10	11	10	100	100
Vt.	17		23	22	18	74	94
Mass.	7		8	8	7	88	100
R. I.	2		2	2	2	100	100
Conn.	6		5	7	7	120	86
N. Y.	280		374	341	297	75	94
N. J.	7		7	9	7	100	100
Pa.	295		398	326	315	74	94
N. E.	660		871	808	701	76	94
Ohio	1,660		2,325	2,053	1,791	71	93
Ind.	600		891	761	644	67	93
Ill.	710		891	807	754	80	94
Mich.	745		1,180	894	808	63	92
Wis.	415		468	485	453	89	92
Minn.	1,240		1,333	1,480	1,329	93	93
Iowa	1,630		1,676	1,915	1,723	97	95
Mo.	1,380		1,548	1,702	1,472	89	94
S. Dak.	1,870		1,574	2,300	1,998	119	94
Nebr.	1,020		895	1,248	1,079	114	95
N. Cent.	11,270		12,781	13,645	12,051	88	94
Del.	2		2	2	2	100	100
Md.	50		69	52	52	72	96
Va.	325		368	345	342	84	95
W. Va.	340		501	394	363	68	94
N. C.	48		57	52	50	84	96
Ky.	750		1,051	930	800	71	94
Tenn.	355		385	393	373	92	95
E. Cent.	1,870		2,453	2,168	1,982	76	94
S. C.	4		8	5	5	50	80
Ga.	15		24	16	16	62	94
Fla.	20		30	23	22	67	91
Ala.	31		42	38	33	74	94
Miss.	65		70	71	67	93	97
Ark.	90		95	105	92	95	98
La.	240		273	258	253	88	95
Okla..	300		365	320	326	82	92
Tex.	9,425		9,416	10,363	10,091	100	93
South	10,190		10,323	11,197	10,905	99	93
N. Dak.	910		913	1,065	967	100	94
Kans.	1,300		768	974	1,444	169	90
Mont.	3,100		3,386	3,767	3,290	92	94
Idaho	1,325		2,138	1,621	1,473	62	90
Wyo.	2,950		3,677	3,510	3,126	80	94
Colo.	2,325		2,740	2,602	2,475	85	94
N. Mex.	1,700		2,244	2,108	1,863	76	91
Ariz.	610		810	672	645	75	95
Utah	2,140		2,574	2,411	2,289	83	93
Nev.	300		304	666	630	75	95
Wash.	415		654	491	435	63	95
Oregon	1,020		1,840	1,242	1,082	55	94
Calif.	2,425		3,125	2,822	2,587	78	94
West	20,820		25,673	23,951	22,306	81	93
U. S.	44,810		52,101	51,769	47,945	86	93

1. What is the main purpose of the document?



